

Supplier – Oracle Supplier Portal Basic Navigation Quick Reference Guide

Introduction:

This Quick Reference Guide (QRG) provides information on navigating through the new Oracle Supplier Portal including:

- Logging in and navigating the Welcome Springboard
- Session timeout and sign out
- Navigating the Supplier Portal screen
- Search functionality
- Overview of profile management

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Glossary

Acronym	Meaning
PLCB	Pennsylvania Liquor Control Board
PO	Purchase Order
QRG	Quick Reference Guide
UPC	Universal Product Code
VMI	Vendor-Managed Inventory

Logging In

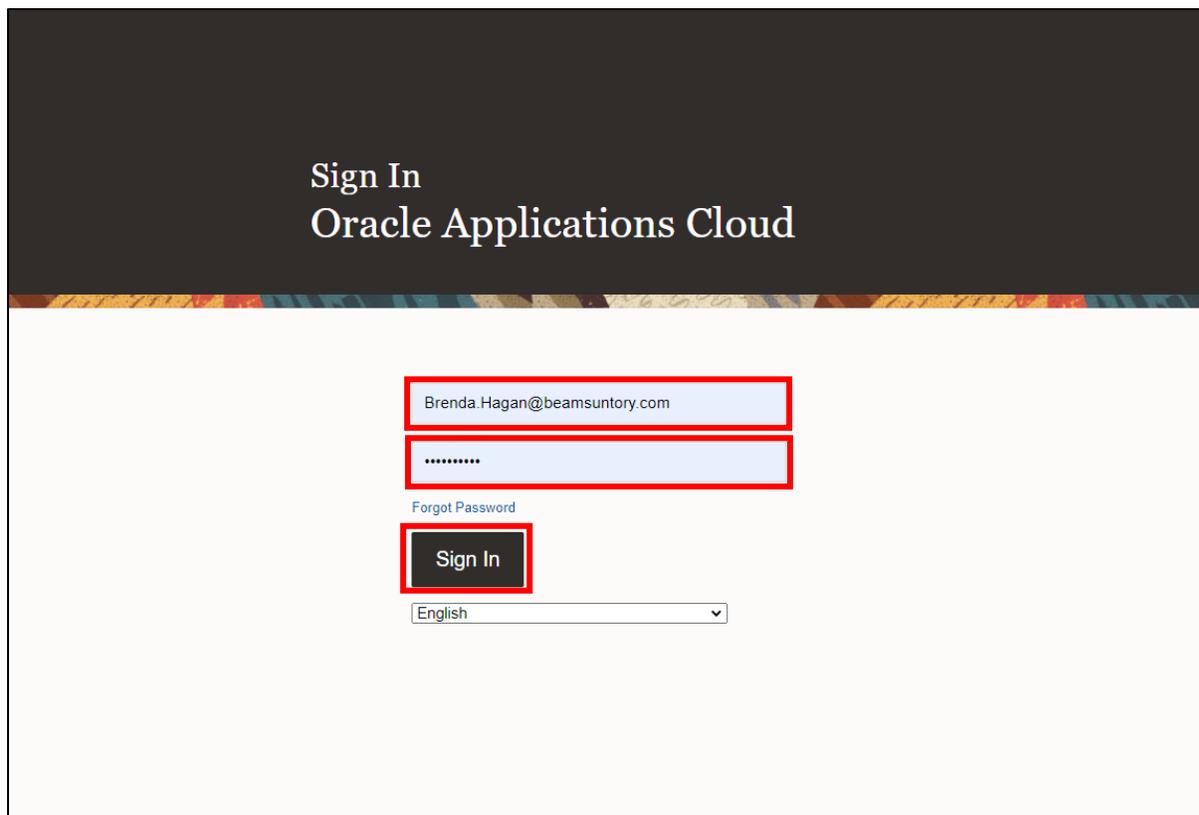
Link to eLearning video: [Log In, Navigate the Welcome Springboard and Sign Out](#)

1. Copy and paste the Supplier Portal link provided to you by the Pennsylvania Liquor Control Board (PLCB) into your web browser.

Note: Use either Chrome or Edge to access the Supplier Portal. Bookmark the link for future use.

2. Enter the **User ID** and **Password** provided to you by the PLCB.
3. Click **Sign In**.

Note: Remember to change your password after logging in for the first time.



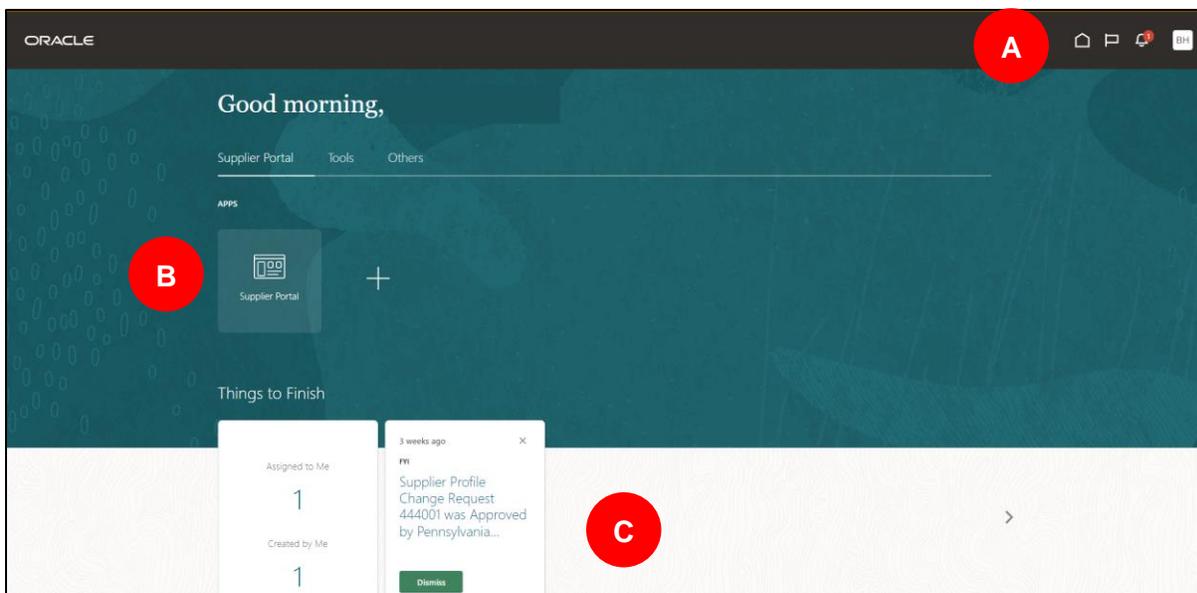
The Welcome Springboard will appear.

Welcome Springboard

The Welcome Springboard shows a Global Header, which you can find on every page of the application. The Global Header contains some icons (Home, Watchlist and Notifications) and the Settings and Actions Menu. You can use them to get to the tasks you want to accomplish.

You can also use tiles on the Welcome Springboard to get to work areas where you do your tasks. Suppliers will only have access to the Supplier Portal Tile.

Let's review the key components available on the Welcome Springboard.

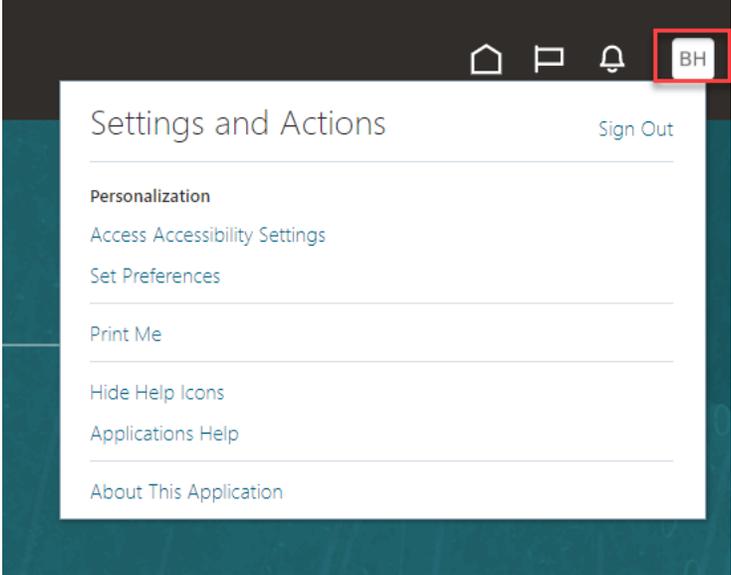


A. Global Header

The Global Header is the uppermost region in the user interface that remains visible regardless of which page the user is on. The key tools available on the Global Header are:



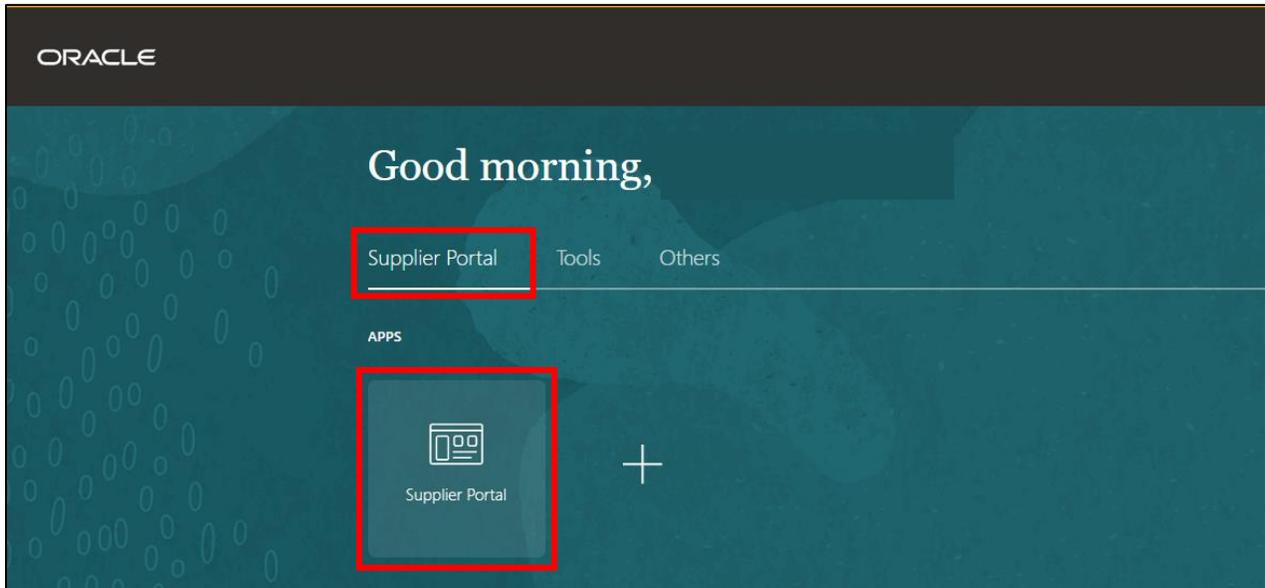
UI Element	Description
Home	<p>The Home Icon allows you to return to the Welcome Springboard from anywhere within the application.</p> 
Notifications	<p>The Notifications Icon allows you to access any notifications sent by the PLCB. For example, change order approvals.</p> <p>Click on the notification subject line link to view its details.</p> 

<p>Settings and Actions</p>	<p>The Settings and Actions Menu allows users to do some general tasks, for example change preferences, troubleshoot issues and sign out.</p> <p>The options users see in this menu depend on their role. For example, an administrator will see more options.</p> 
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B. Supplier Portal Tile

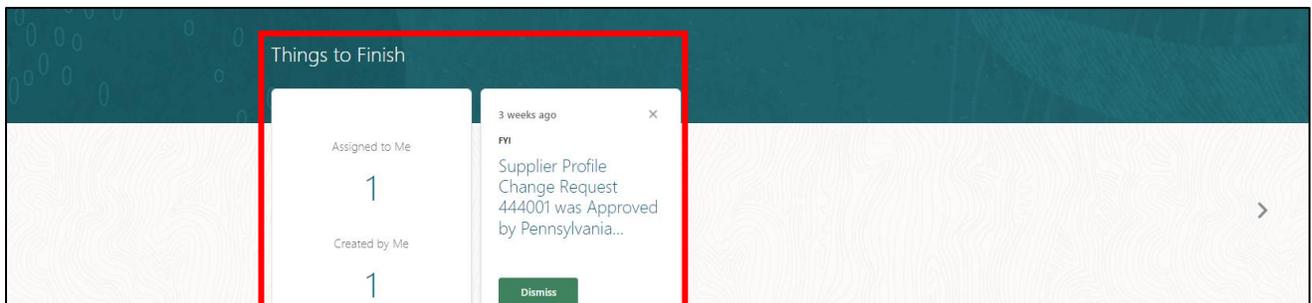
The Supplier Portal Tile is the key area where suppliers will go to view and manage day-to-day transactions with the PLCB.

Click the **Supplier Portal Tile** to access the [Supplier Portal Screen](#).



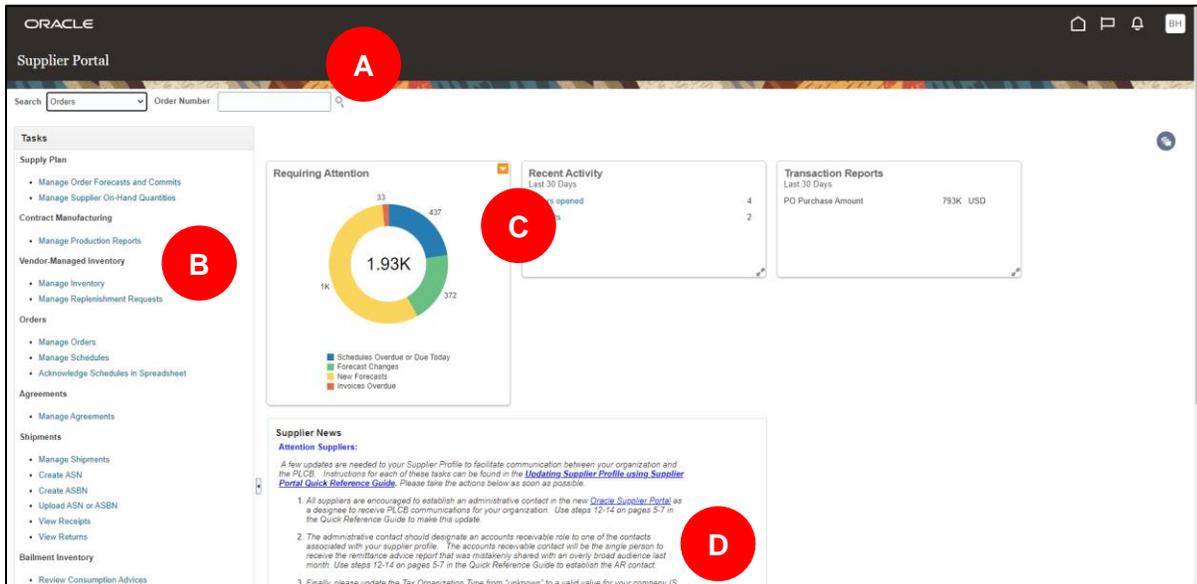
C. Things to Finish Section

The [Things to Finish Section](#) at the bottom of the [Welcome Springboard](#) provides a quick summary view of the tasks or notifications that require attention. For example, you can approve or reject a new notification from this area without opening it, or review updates from the PLCB on any change requests that were submitted.



Supplier Portal Screen

The Supplier Portal Screen provides quick access to tasks and information relevant to the supplier.



The key components available on the Supplier Portal Screen include:

UI Name	Description
A. Quick Search	Use to search for orders, agreements, shipments, invoices, etc.
B. Tasks	Provides quick links to various supplier tasks including Supply Plan, Vendor-Managed Inventory (VMI), Orders, Agreements, Shipments, Bailment Inventory, Profile Management, etc.
C. Infolets	Infolets are small interactive widgets that give key information and show what's going on in the areas users work on. Users might also find something that they need to follow up on.
D. Supplier News	The <u>Supplier News Section</u> provides updates to any supplier-related news and announcements made by the PLCB.

Sign Out and Session Timeout

After users complete their tasks, they can sign out of the Supplier Portal. However, sometimes they might get automatically signed out due to session timeouts. Below are a few scenarios when the browser inactivity timeout happens.

- If they leave their browser idle for more than 30 minutes.
- If they don't use the keyboard or mouse for more than 10 minutes.

Best practices for minimizing timeouts:

- Sign in to only one active application instance.
- Don't sign into the application in multiple browsers simultaneously.
- Don't sign into the application in multiple tabs of the same browser simultaneously.
- Sign out after completing work.

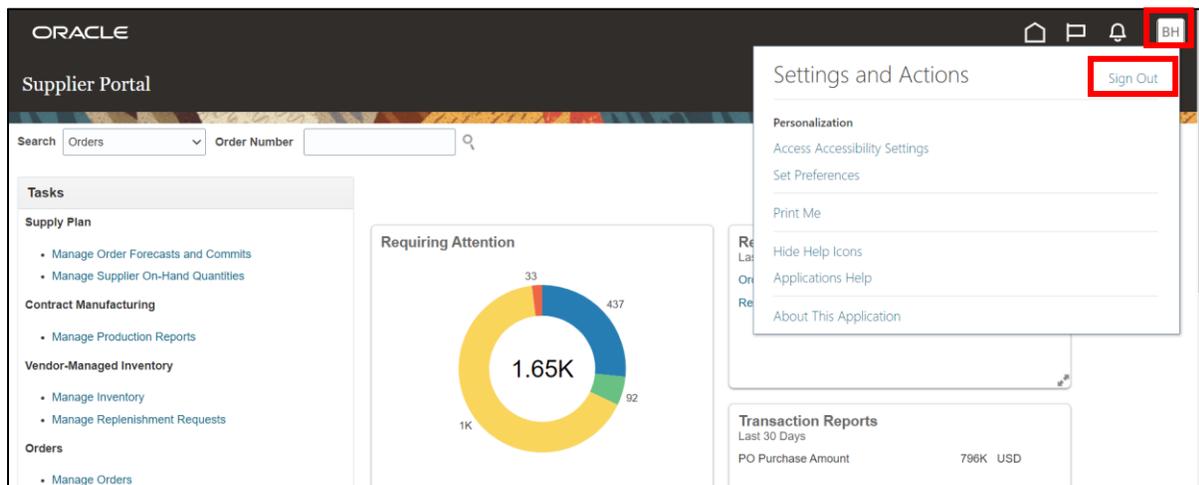
Note: Session timeouts are predefined and can't be edited.

Once done working in their application, users can sign out using the Settings and Actions Menu.

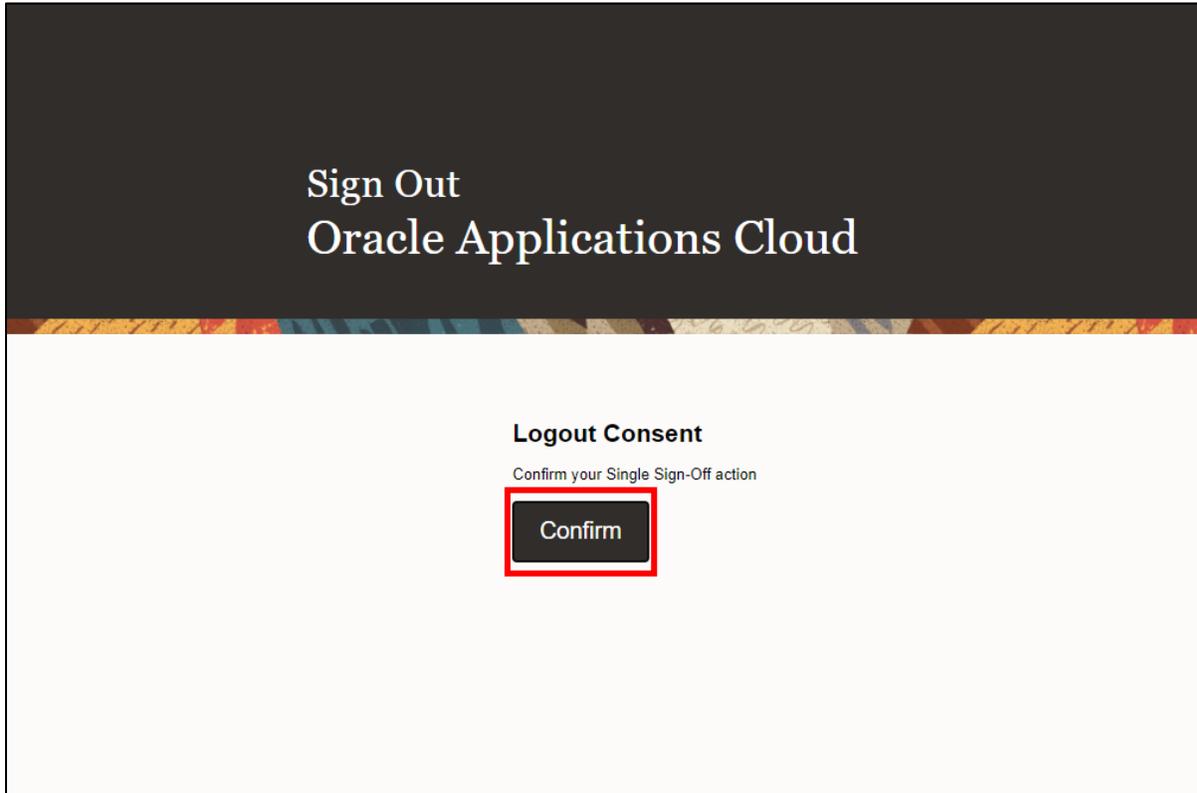
Link to eLearning video: [Log In, Navigate the Welcome Springboard and Sign Out](#)

Sign Out

1. Click the **Settings and Actions Icon** to open the Settings and Actions Menu.
2. Select **Sign Out**.



3. Click **Confirm** to sign out of the application.

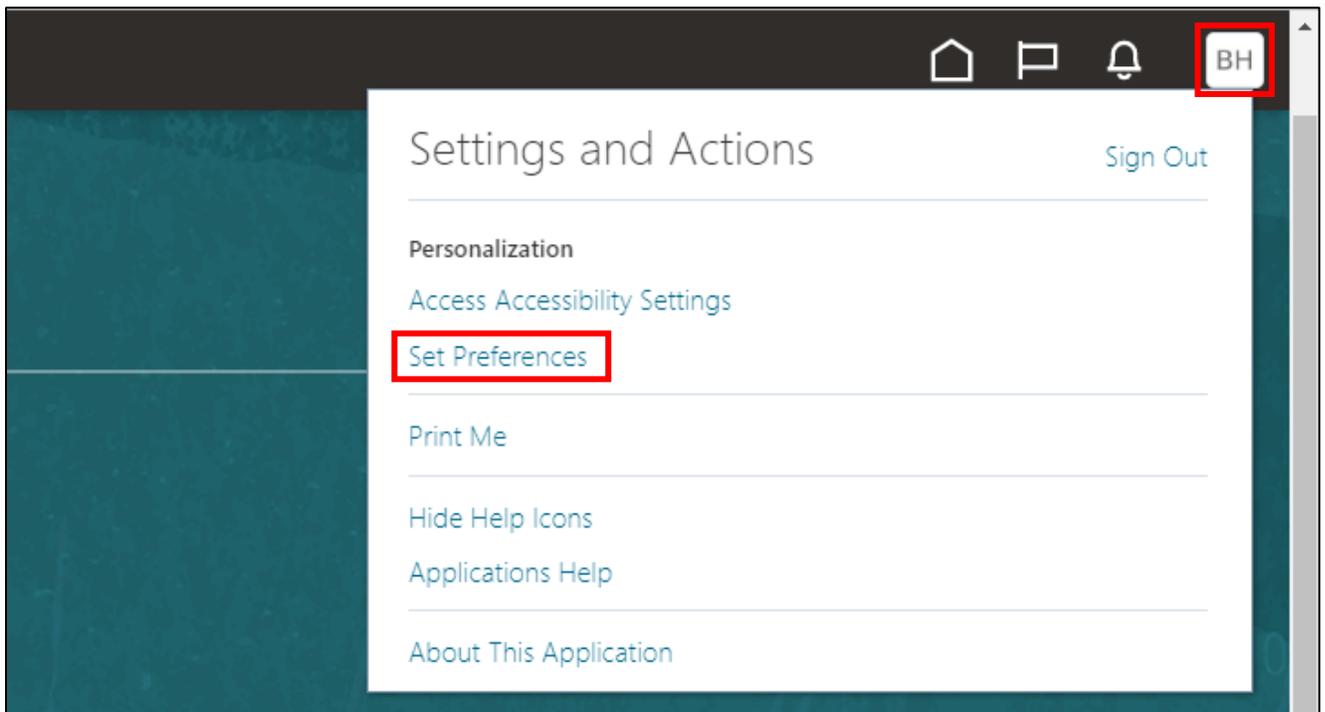


Setting Preferences

Suppliers can use the [Settings and Actions Menu](#) to update their user preferences.

Link to eLearning video: [Setting Preferences in Oracle Supplier Portal](#)

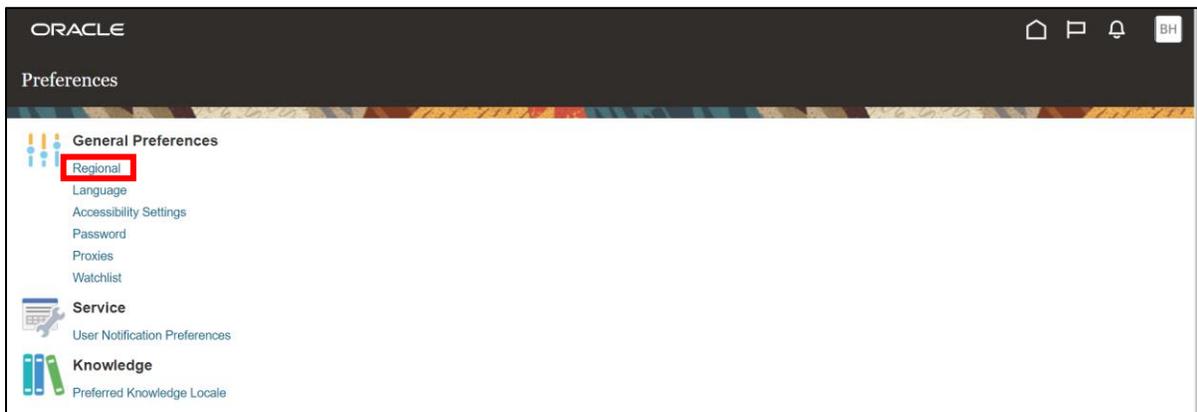
1. Click the **Settings and Actions Icon**.
2. Select **Set Preferences** under [Personalization](#).



The [Preferences Screen](#) will appear.

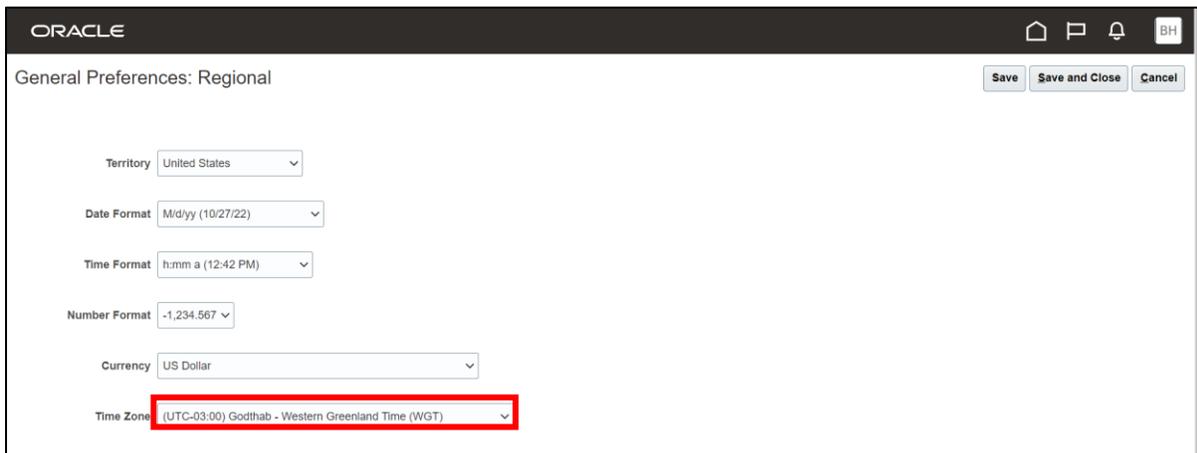
Note: In this example, we will use the Preferences Screen to update the password and time zone.

3. Click **Regional** under the General Preferences Heading.

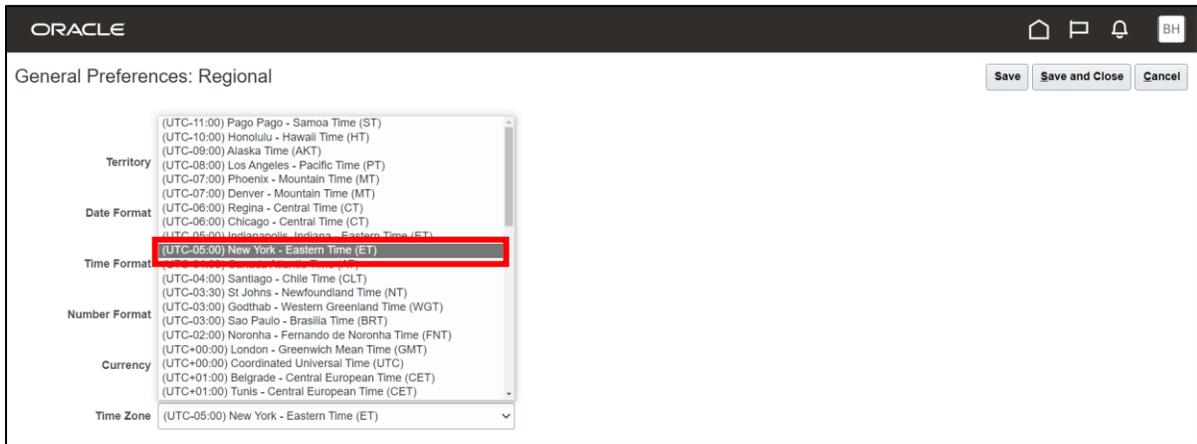


The General Preferences: Regional Screen will appear.

4. Click the dropdown menu next to Time Zone.



5. Select the desired time zone.

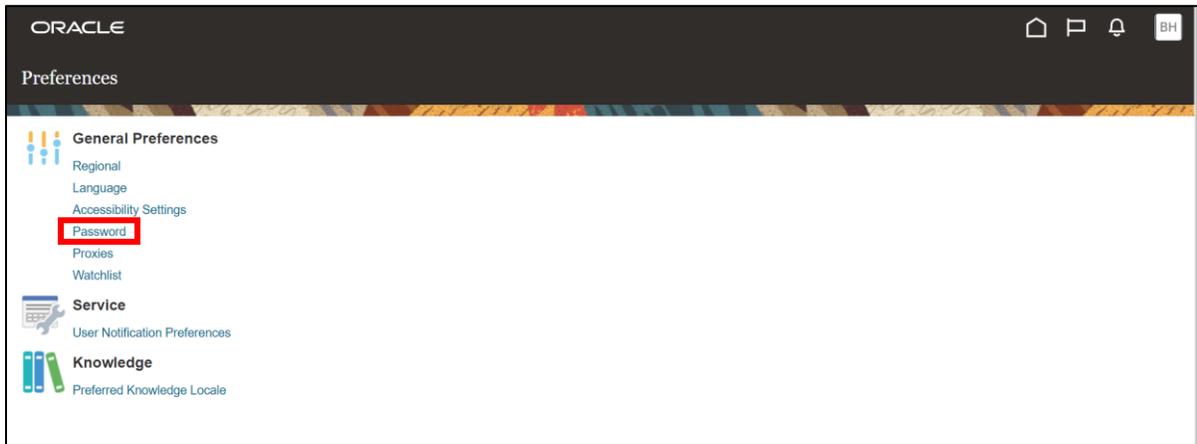


6. Click **Save and Close**.



The Preferences Screen will appear.

7. Click **Password** under the General Preferences Heading.

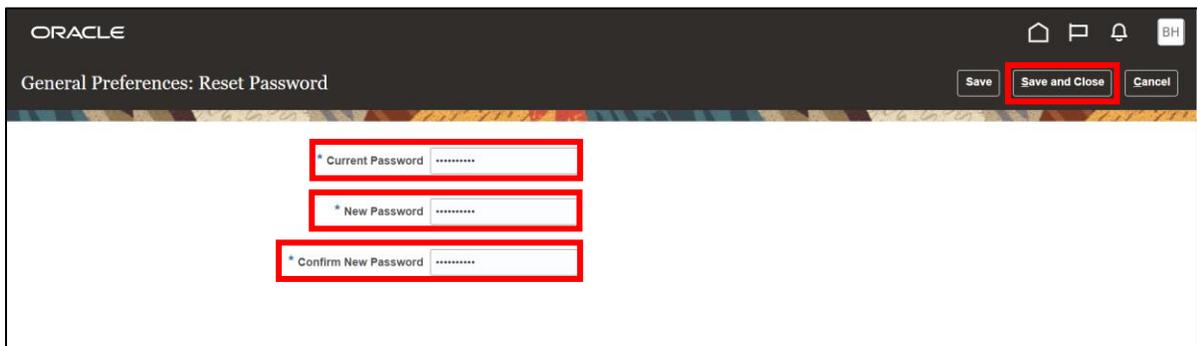


The General Preferences: Reset Password Screen will appear.

8. Enter [Current Password] in the Current Password Field.

9. Enter [New Password] in the New Password Field, then enter it again in the Confirm Password Field.

10. Click **Save and Close**.



The Preferences Screen will appear.

Searching in Supplier Portal

There are different types of search functions available to you:

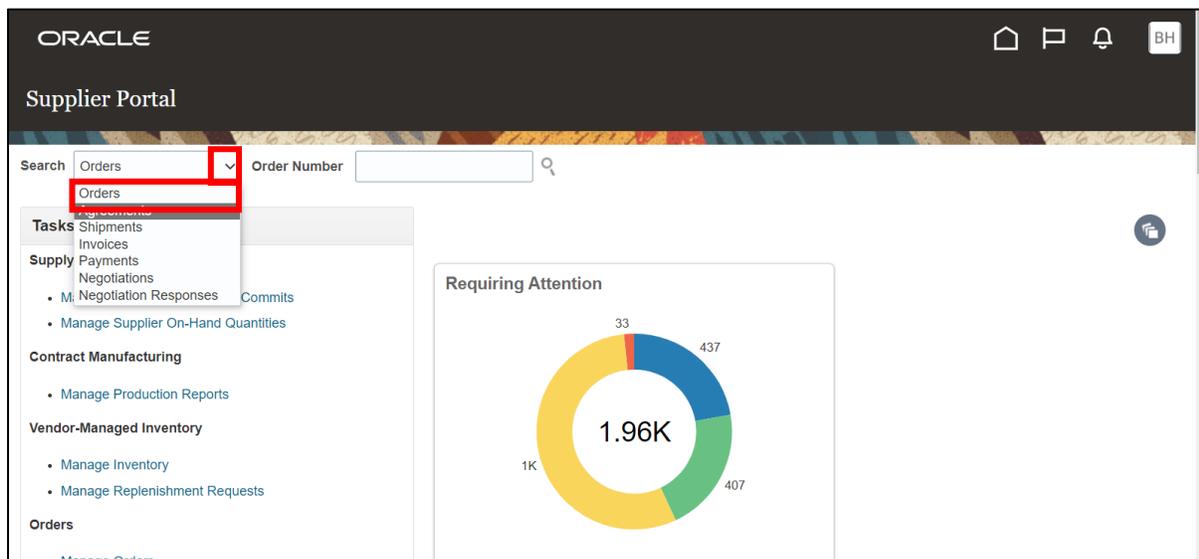
- Quick Search
- Basic Search
- Advanced Search

Quick Search Examples

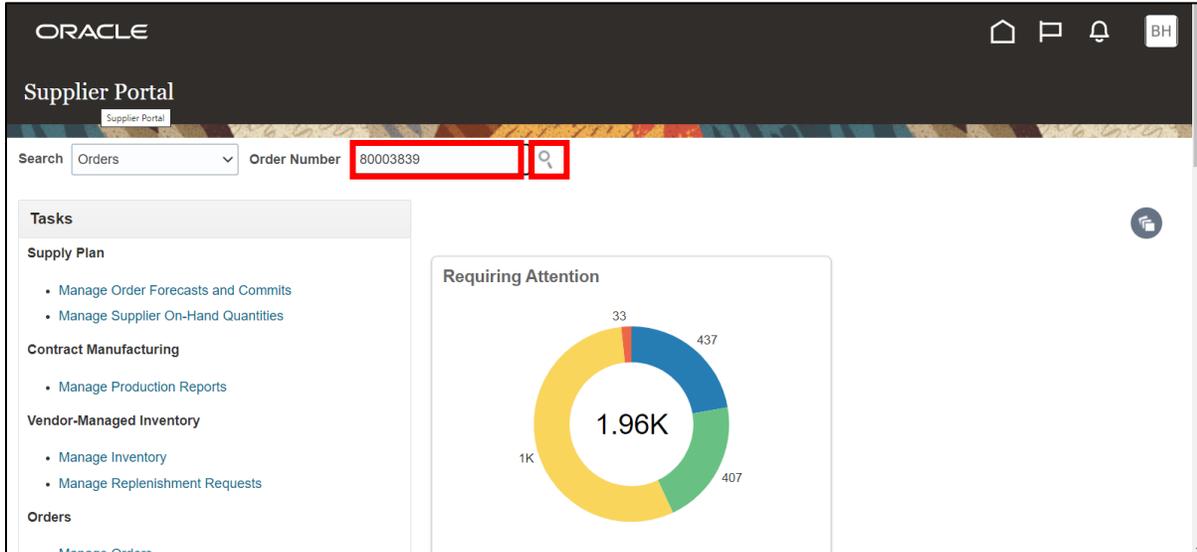
The quick search option is available directly on the Supplier Portal Screen.

Link to eLearning video: [Searching in Oracle Supplier Portal - Quick Search Examples](#)

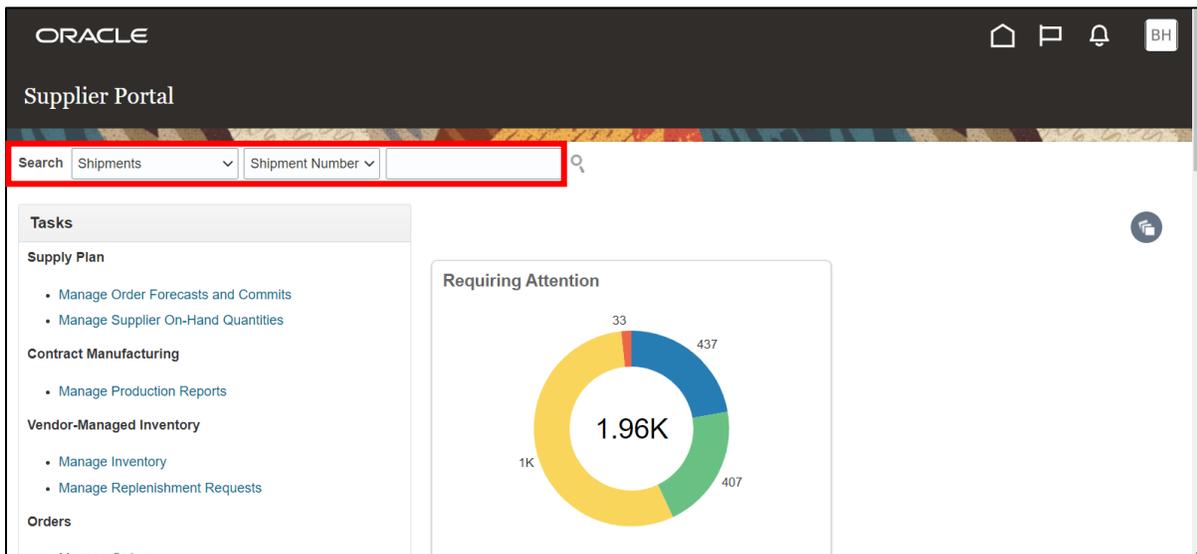
1. Click the dropdown menu next to Search.
2. Select the required option. In this example, **Orders**.



3. Enter [Order Number] in the Order Number Field.
4. Click the **Search Icon** (Magnifying Glass).



Note: The search criteria will change depending on the option selected from the dropdown menu next to Search. An example for shipments is below. In this example, the system will perform an open search on all supplier shipments.



The searched record details will appear.

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5. Review the purchase order (PO) Details.
6. Click **Done** to exit.

ORACLE Non-Bailment Order: 80003839 [?](#) [Print PO](#) [Acknowledge](#) [Actions](#) [Refresh](#) [Done](#)

Main

General

Sold-to Legal Entity	Pennsylvania Liquor Control Board	Supplier	JIM BEAM BRANDS CO	Ordered	8,128.26 USD
Bill-to BU	ENTERPRISE BU	Supplier Site	P-KY-LOUIS-03	Description	Source Agreement BPA_1184
Order	80003839	Supplier Contact		Supplier Order	
Status	Open	Bill-to Location	PLCB - AP OFFICE		
Buyer	Rituraj Thakur	Ship-to Location	DC5		
Creation Date	10/19/22				

Terms Notes and Attachments

Required Acknowledgment	None	Shipping Method	
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Order Life Cycle

Ordered

0 2K 4K 6K 8K 10K

Amount (USD)

[View Details](#)

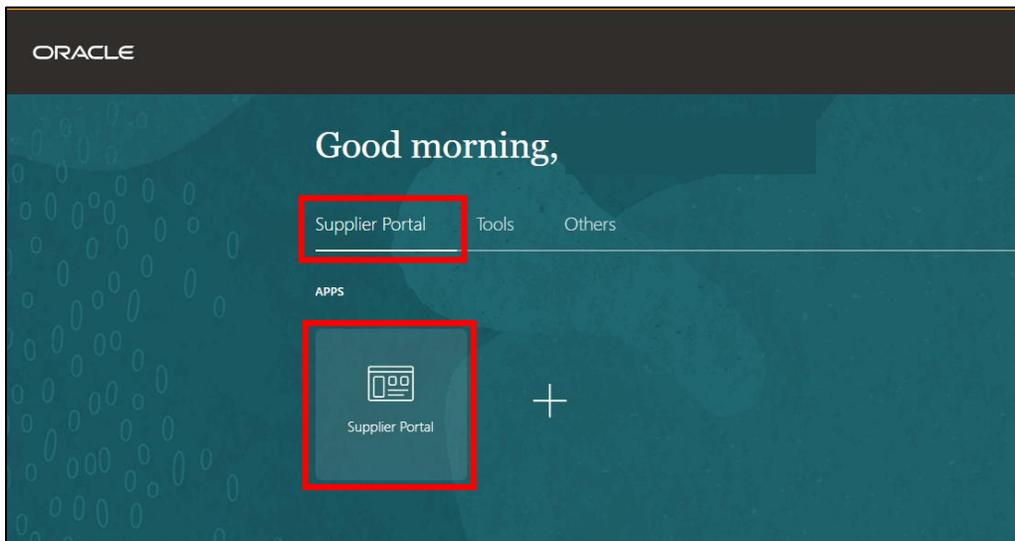
Basic Search Example

The basic search feature is available on almost all the screens in the Supplier Portal.

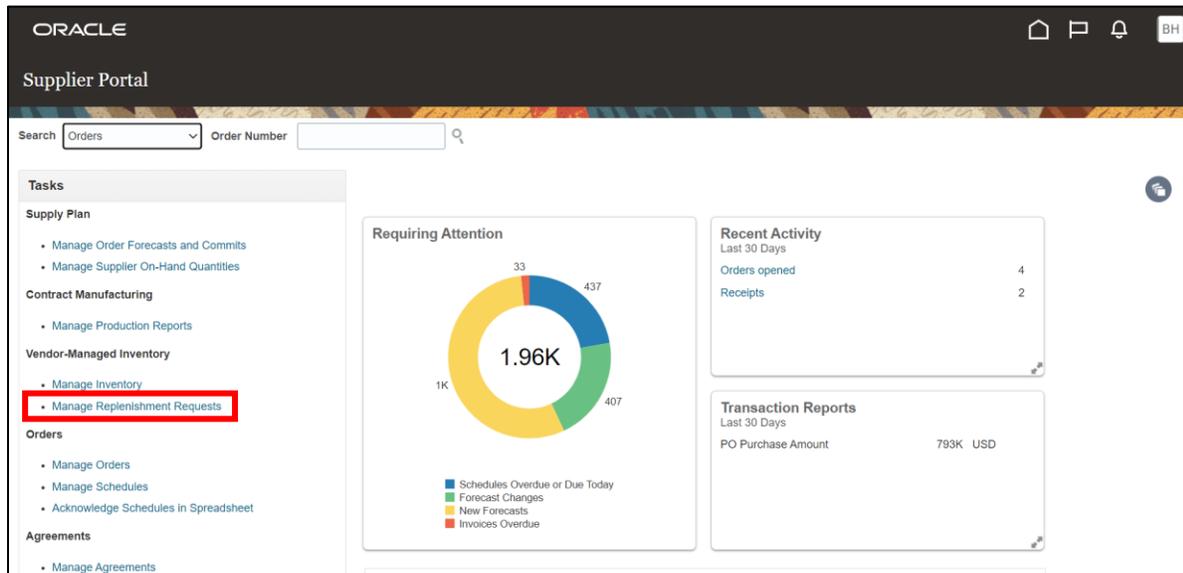
In this example, we will use the Manage Replenishment Requests Screen to review the basic search functionality.

Link to eLearning video: [Searching in Oracle Supplier Portal – Basic Search Example](#)

1. Navigate to the Welcome Springboard.
2. Click the **Supplier Portal Tile**.



3. Select **Manage Replenishment Requests** under the Vendor-Managed Inventory Heading.

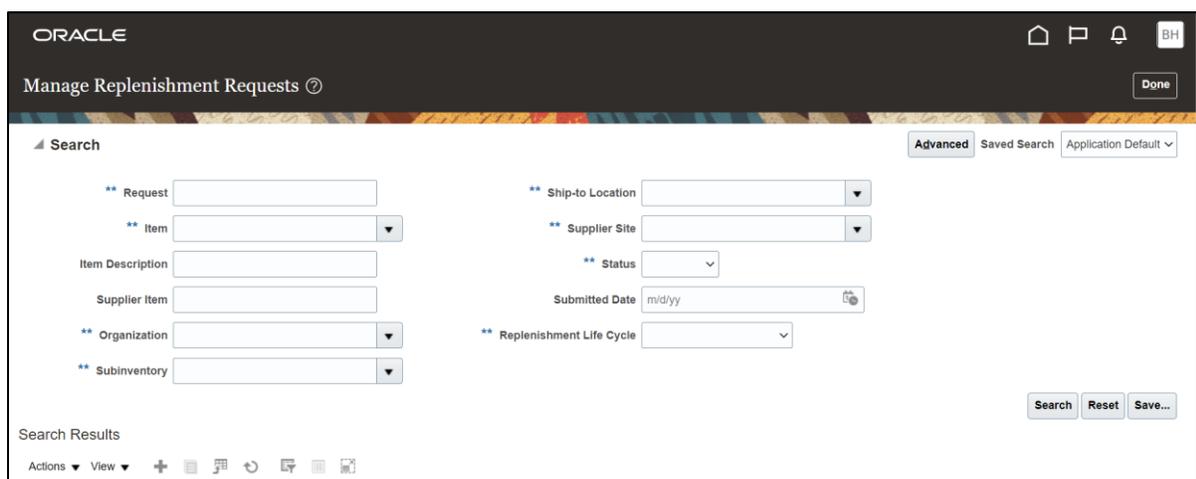


The Manage Replenishment Requests Screen will appear.

Notes: The Search Section provides multiple fields (search criteria) that users can use to filter and narrow down search results.

Fields marked with a single asterisk (*) are mandatory fields that must be filled out. Fields marked with double asterisks (**) mean that at least one of the fields must be filled out.

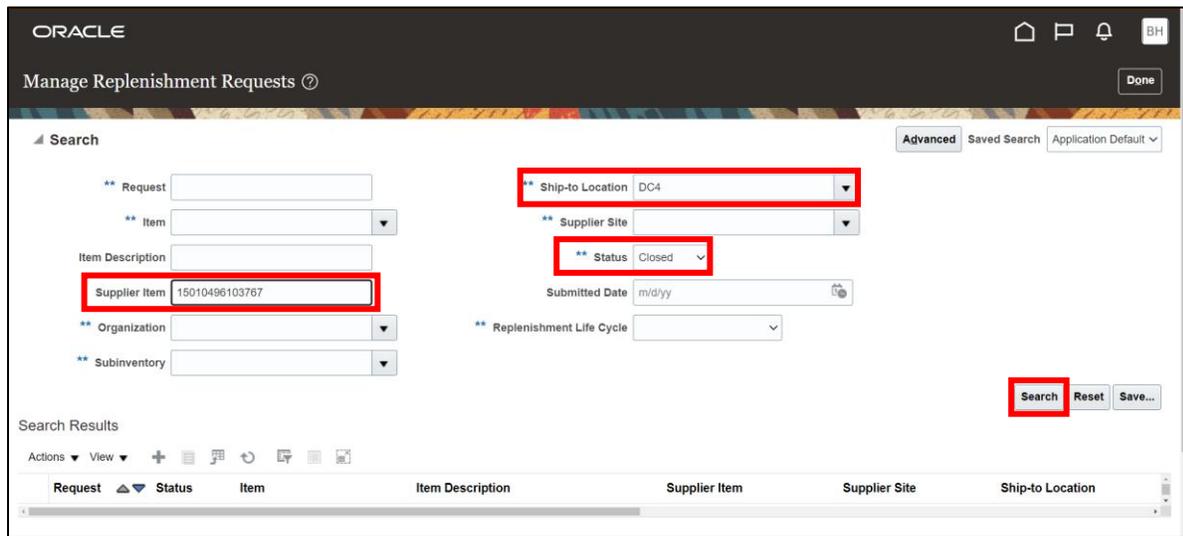
If there is no asterisk, the field can be left blank.



4. Enter the desired search criteria. For example:

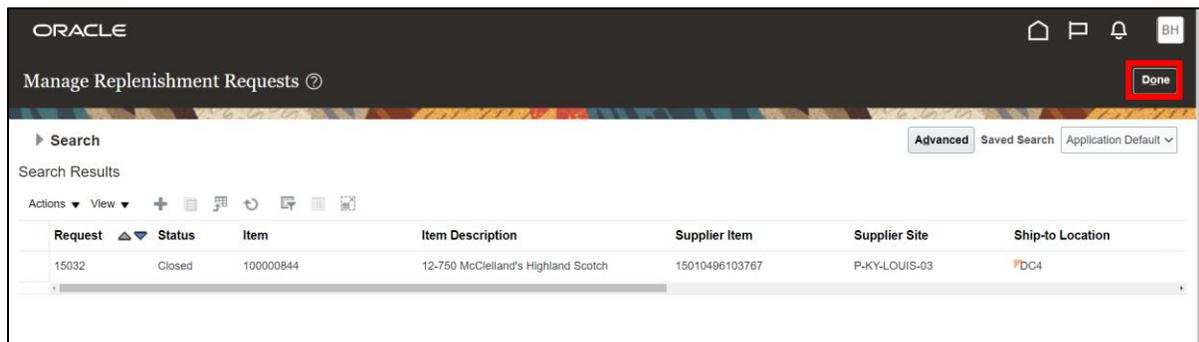
Field Name	Description
Supplier Item	Enter [supplier SCC item number].
Ship-to Location**	Enter [Ship-To Location].
Status**	Select the applicable replenishment request status.

5. Click **Search**.



The Search Results will appear.

6. Click **Done** to exit.



Advanced Search Example

The advanced search option is available on most of the screens in the Supplier Portal where the basic search is available.

The advanced search option allows users to enter additional search conditions. The search conditions on the [Advanced Search Screen](#) may differ from one field to another.

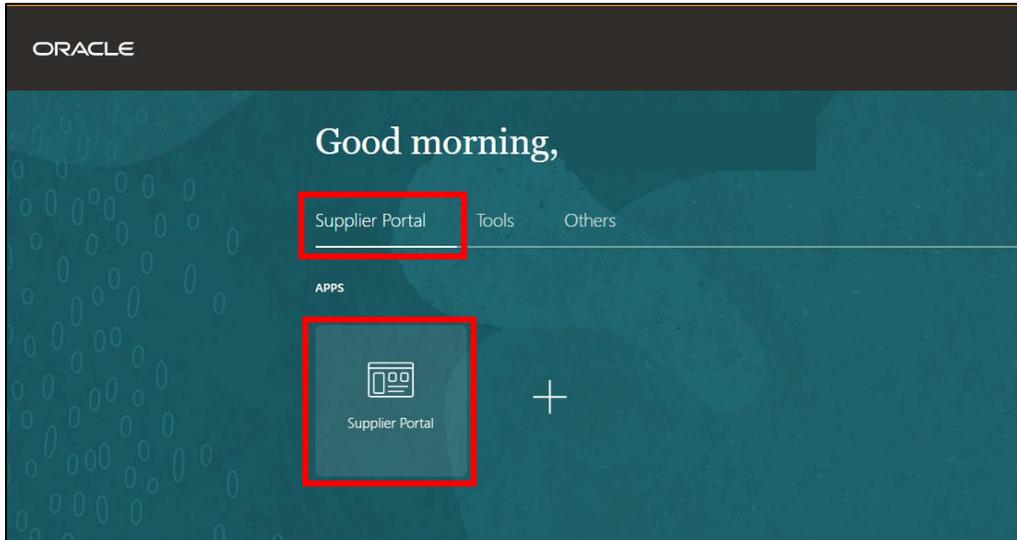
Typically, the following operators are supported:

Operator	Description
Starts with	Use this operator to find a partial match only at the beginning.
Ends with	Use this operator to find a partial match that only ends with relevant criteria.
Equals	Use this operator to find an exact match to relevant criteria.
Does not equal	Use this operator to exclude the entered search criteria.
Less than	Use this operator to include results lower in value than a value specified.
Greater than	Use this operator to include results greater in value than a value specified.
Less than or equal to	Use this operator to include results less than or equal to the value specified.
Greater than or equal to	Use this operator to include results greater than or equal to the value specified.
Between	Use this operator to include results between a particular range.
Not between	Use this operator to exclude results that fall between a particular range.
Contains	Use this operator to find a partial match.
Does not contain	Use this operator to exclude attributes specified in the field.
Is blank	Use this operator to include blank values for the searched attribute.
Is not blank	Use this operator to exclude blank values for the searched attribute.

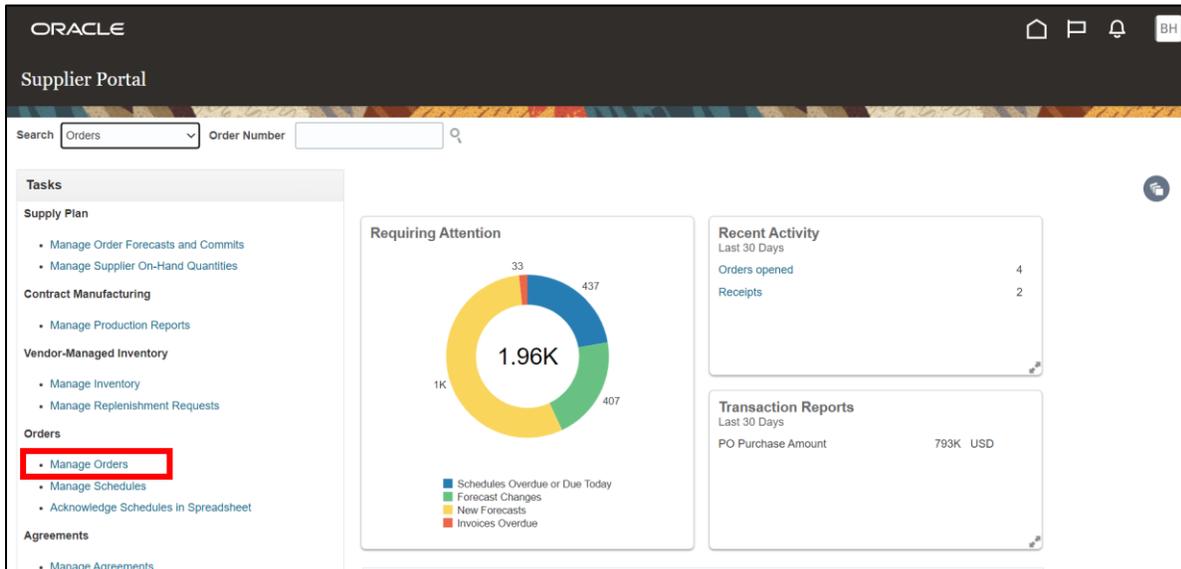
Link to eLearning video: [Searching in Oracle Supplier Portal – Advanced Search Example](#)

In this example, we will use the Manage Orders Screen to review the advanced search functionality.

1. Navigate to the Welcome Springboard.
2. Click the **Supplier Portal Tile**.

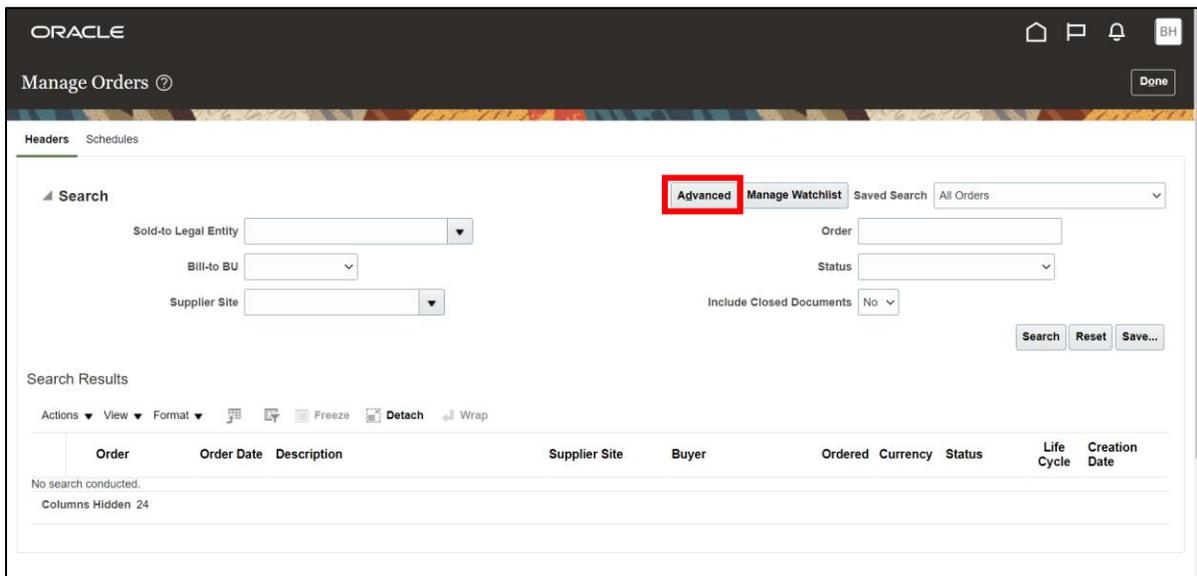


3. Select **Manage Orders** under the Order Heading.



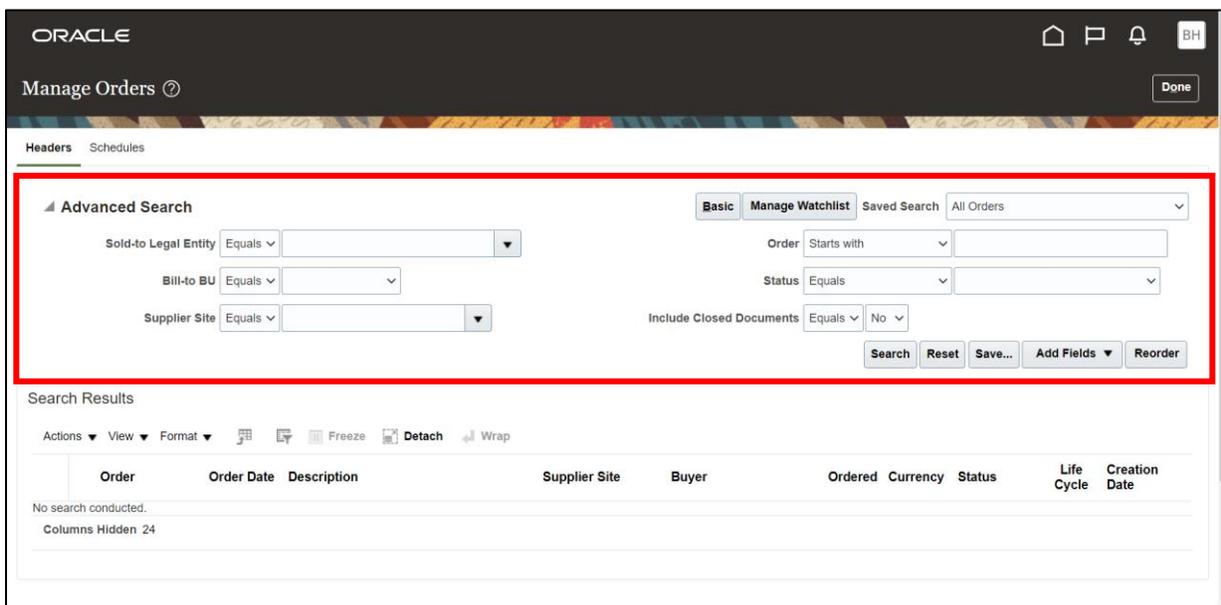
The Manage Orders Screen will appear.

4. Click **Advanced** to switch to the advanced search.

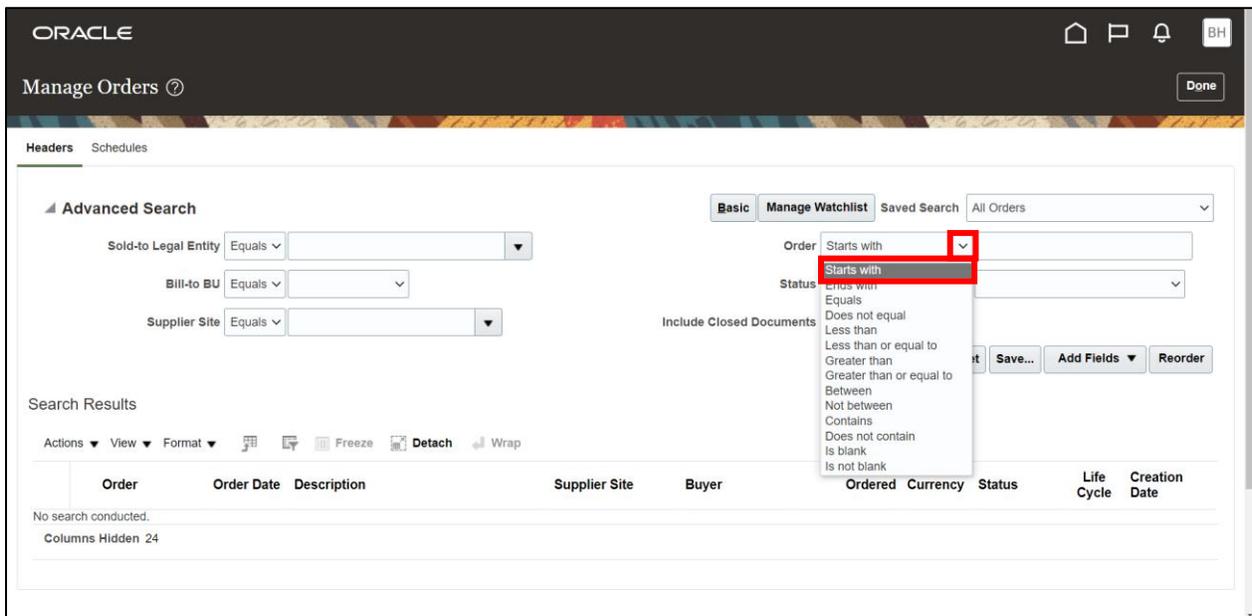


The Advanced Search Section will appear.

Note: Here users can choose a combination of fields and operators to narrow down search results.

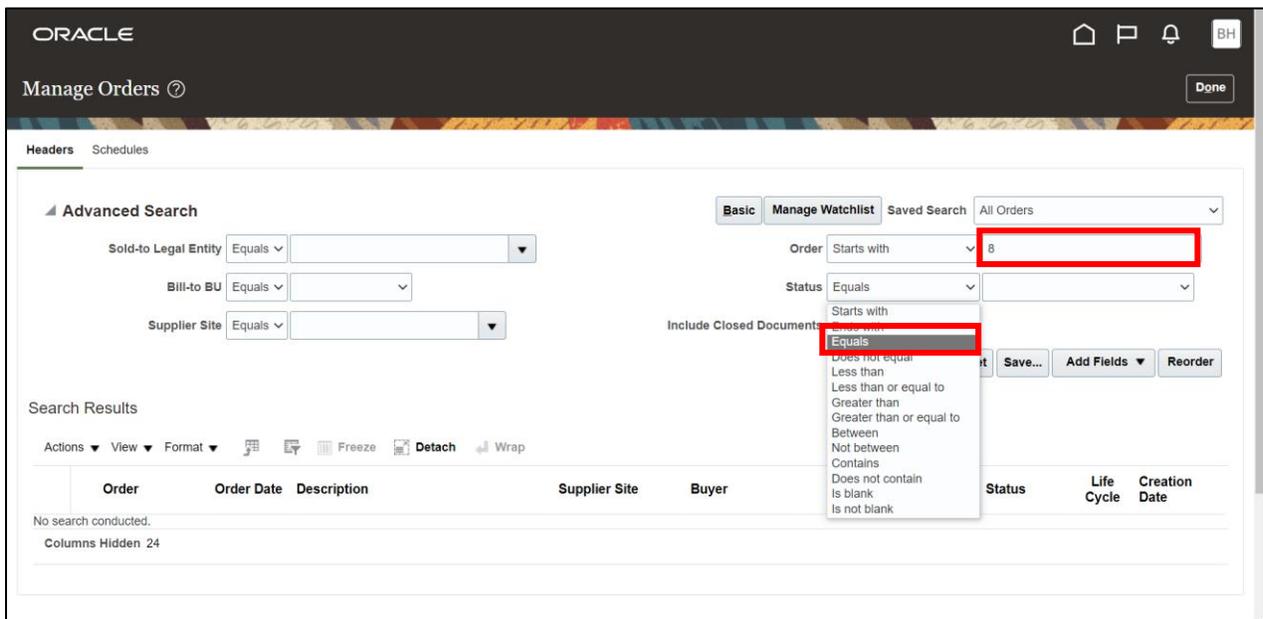


5. Select **Starts with** from the dropdown menu next to Order.

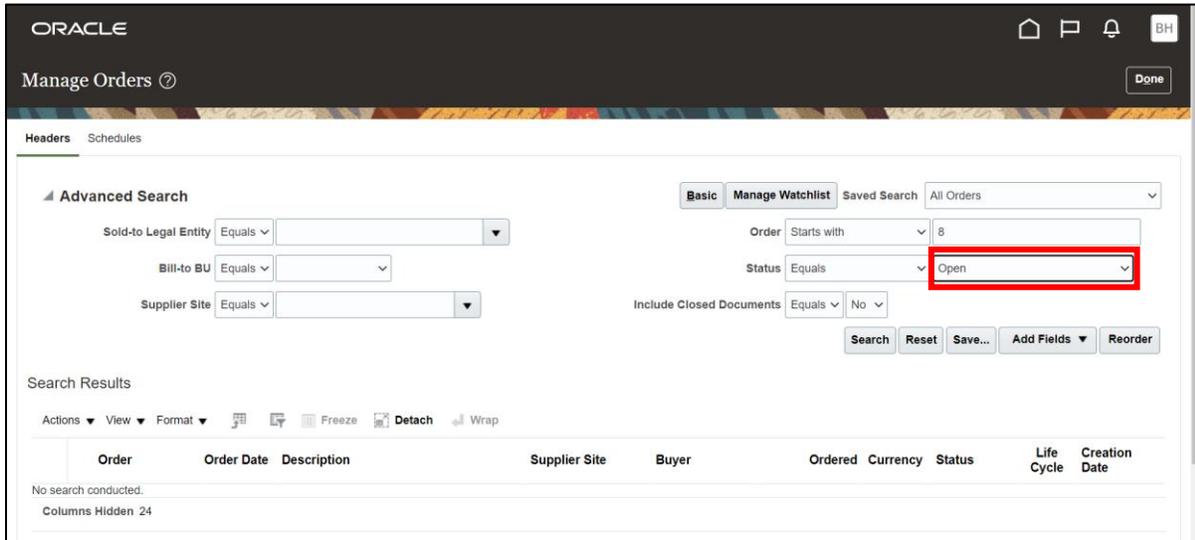


6. Enter a search query in the Order Field. In this example, **8**.

7. Select **Equals** from the dropdown menu next to Status.

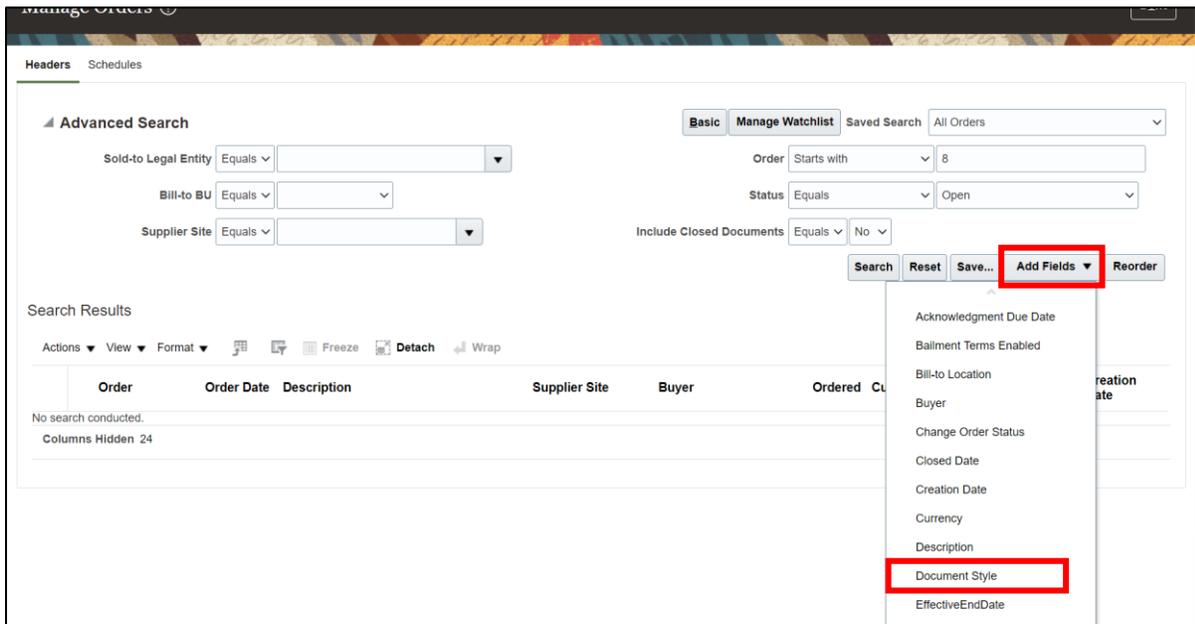


8. Select the desired status from the second dropdown menu next to Status. In this example, **Open**.



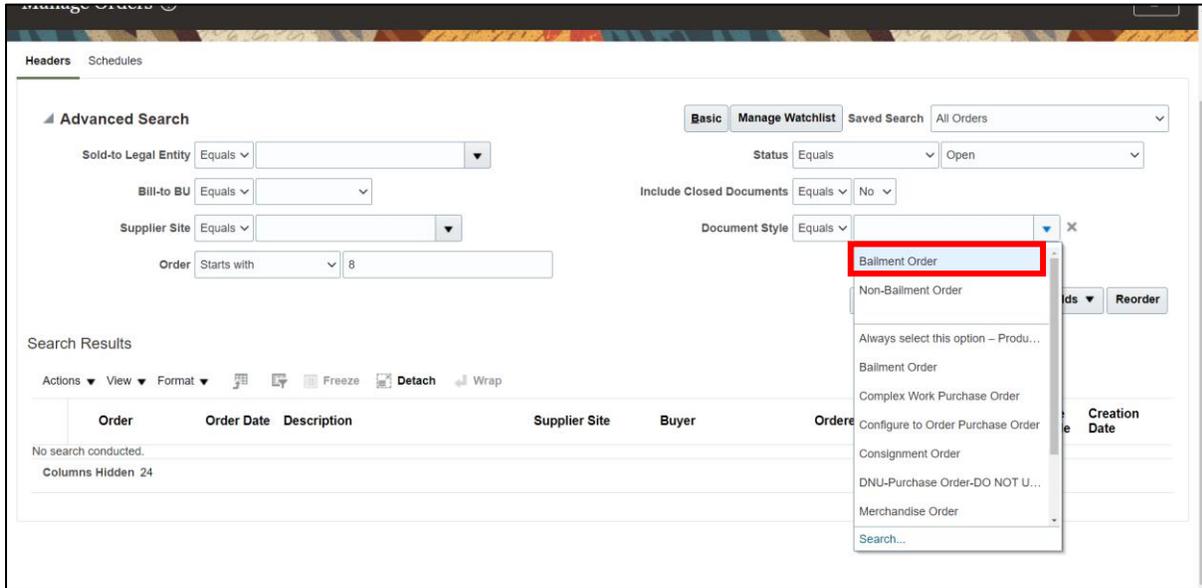
Note: Users can also add additional fields to an advanced search.

9. Click **Add Fields**.
10. Select the field to add to search criteria. In this example, **Document Style**.



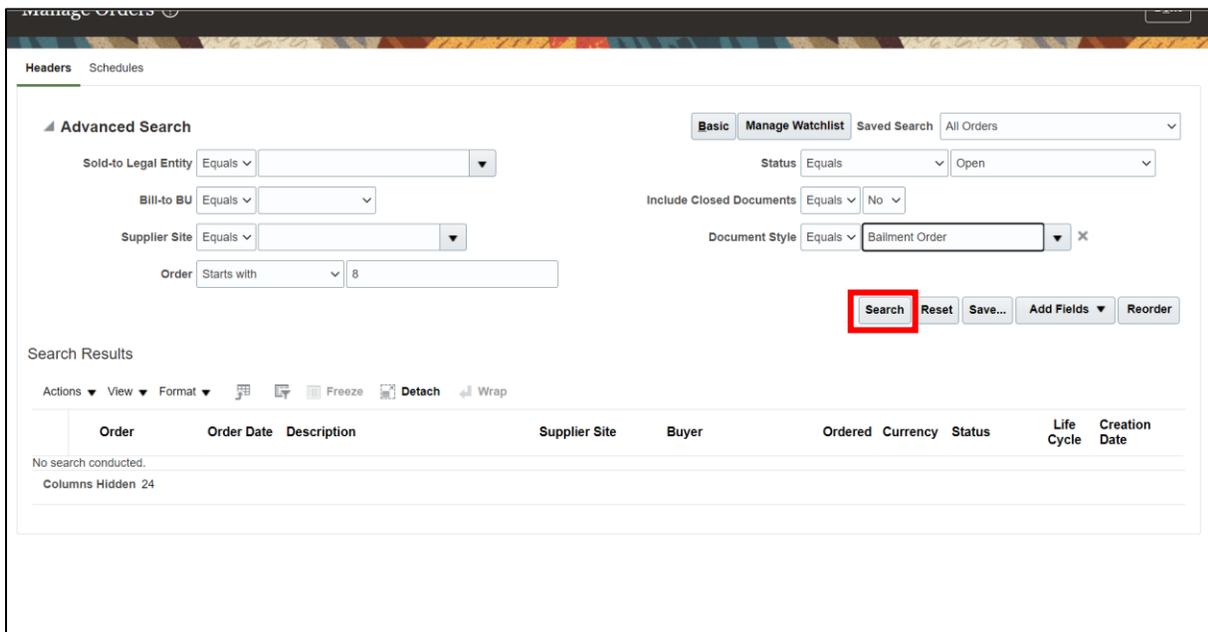
The Document Style Field will be added.

11. Select the desired option from the dropdown menu next to Document Style. In this example, **Bailment Order**.



Note: Suppliers will only use Bailment Order and Non-Bailment Order document styles.

12. Click **Search**.



The Search Results will appear.

13. Click **Done** to exit.

The screenshot shows the Oracle Supplier Portal interface for 'Manage Orders'. The top navigation bar includes the Oracle logo, a home icon, a flag icon, a notification bell, and a user profile icon labeled 'BH'. The main header area contains the text 'Manage Orders' and a 'Done' button highlighted with a red box. Below the header, there are tabs for 'Headers' and 'Schedules'. An 'Advanced Search' section is visible, with buttons for 'Basic', 'Manage Watchlist', and 'Saved Search', and a dropdown menu set to 'All Orders'. The 'Search Results' section displays a table with columns: Order, Order Date, Description, Supplier Site, Buyer, Ordered, Currency, Status, Life Cycle, and Creation Date. Two rows of data are shown. Below the table, there is a 'Columns Hidden 24' indicator.

Order	Order Date	Description	Supplier Site	Buyer	Ordered	Currency	Status	Life Cycle	Creation Date
80003842	10/19/22		P-KY-LOUIS-03	Thakur, Rituraj	758,851.80	USD	Open	🔄	10/19/22
80003724	9/21/22		P-KY-LOUIS-03	Robinson, David	758,851.80	USD	Open	🔄	9/21/22

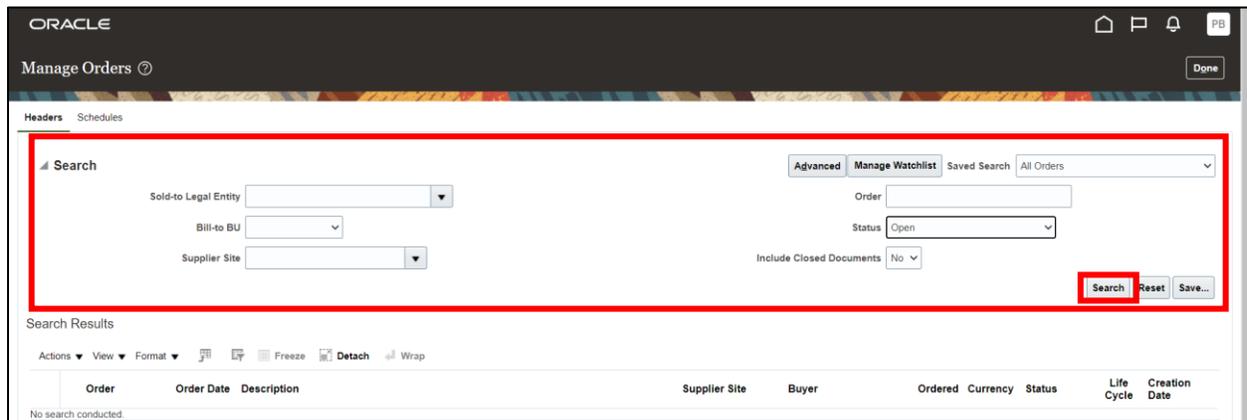
Save a Search

Users can save one or several frequently used search criteria for a particular screen in the Supplier Portal.

Below are the steps to save a search using the Manage Orders Screen as an example.

Link to eLearning video: [Saving a Search in Oracle Supplier Portal](#)

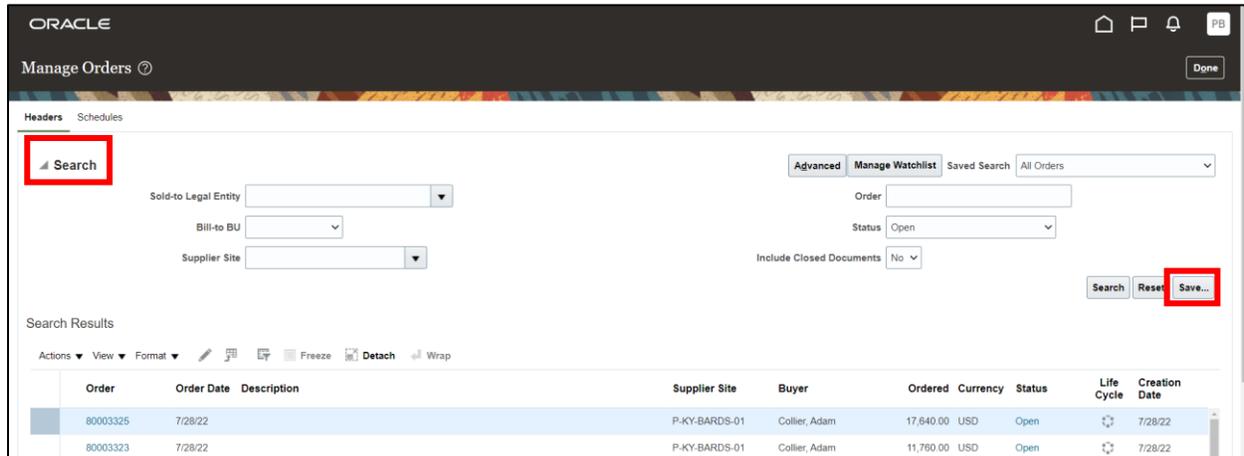
1. Enter the desired search criteria in the Search Section.
2. Click **Search**.



The Search Results will appear.

Note: You can also customize the columns you would like to see on the screen using the View Menu. Adding or removing columns will change the layout of the page going forward. You cannot customize columns for each saved search.

3. Click **Search** to expand the Search Section.
4. Click **Save...**

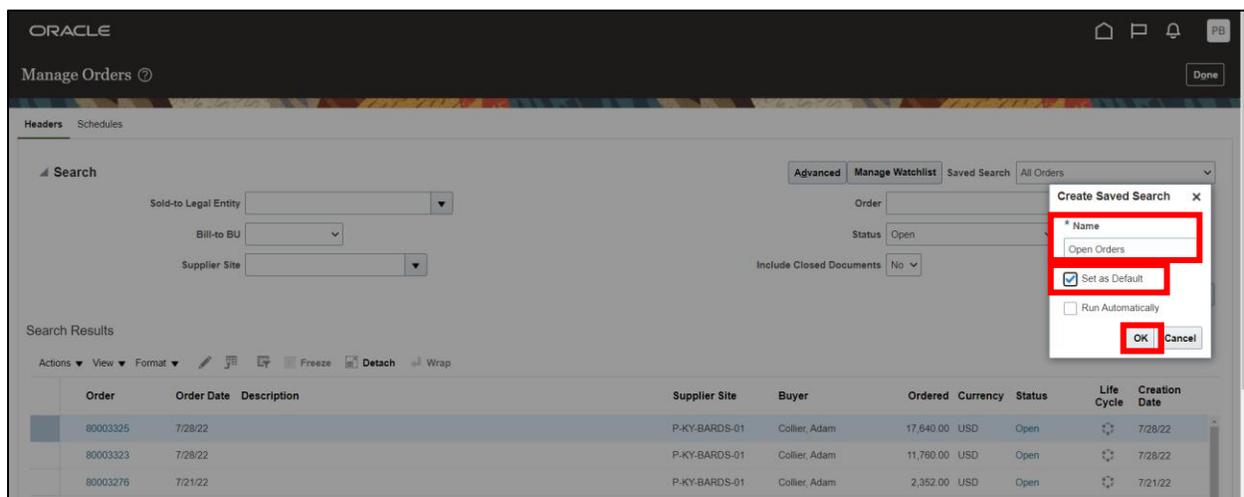


The Create Saved Search pop-up will appear.

5. Enter [appropriate Name] for the search in the Name Field.
6. Select the **Set as Default Checkbox** if this search is to be the default criteria.

Note: If users need this search to automatically run every time they visit this page, select the Run Automatically Checkbox.

7. Click **OK**.



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Note: The search will be saved under the dropdown menu next to Saved Search and will default every time the page is visited in the future.

The screenshot shows the Oracle Supplier Portal interface for 'Manage Orders'. The search filters include 'Sold-to Legal Entity', 'Bill-to BU', and 'Supplier Site'. The 'Saved Search' dropdown menu is open, showing options like 'Open Orders', 'All Orders', and 'Changed or Canceled in the Last 30 Days'. The search results table is displayed below.

Order	Order Date	Description	Supplier Site	Buyer	Ordered	Currency	Status	Life Cycle	Creation Date
80003325	7/28/22		P-KY-BARDS-01	Collier, Adam	17,640.00	USD	Open		7/28/22
80003323	7/28/22		P-KY-BARDS-01	Collier, Adam	11,760.00	USD	Open		7/28/22
80003276	7/21/22		P-KY-BARDS-01	Collier, Adam	2,352.00	USD	Open		7/21/22
ASNPO-164900044	6/9/22		P-KY-BARDS-01	Conversion, User	112,867.56	USD	Open		6/9/22
ASNPO-164900044	6/9/22		P-KY-BARDS-01	Conversion, User	98,778.48	USD	Open		6/9/22
ASNPO-164900044	6/9/22		P-KY-BARDS-01	Conversion, User	97,079.82	USD	Open		6/9/22
ASNPO-164900044	6/9/22		P-KY-BARDS-01	Conversion, User	101,443.92	USD	Open		6/9/22

Search by “Query By Example” Function

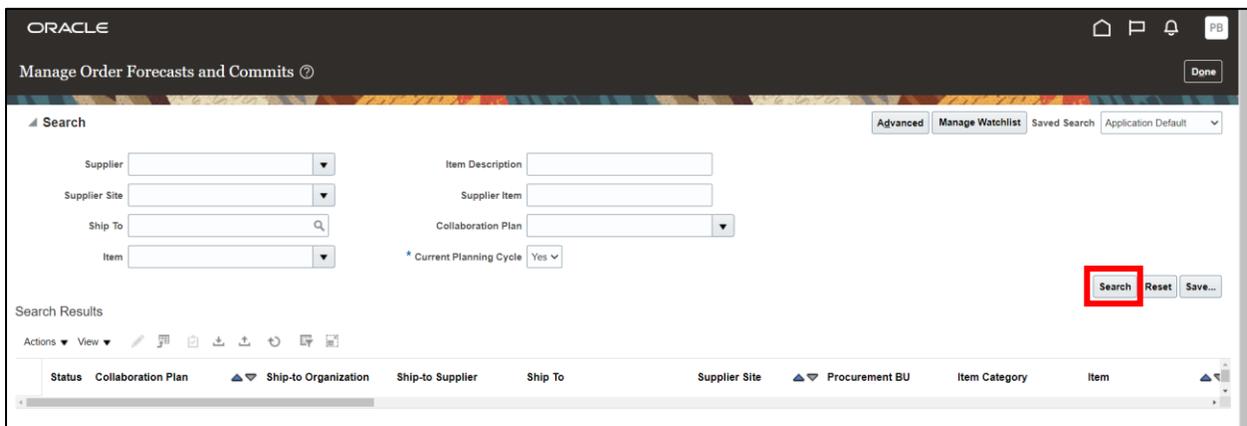
The “Query By Example” function provides access to a row of fields that precedes the table column headers. These fields then can be used to further filter the data in the table.

This function is available on any screen where a grid or table exists.

The below steps show how to use the “Query By Example” function on the Manage Order Forecasts and Commits Screen.

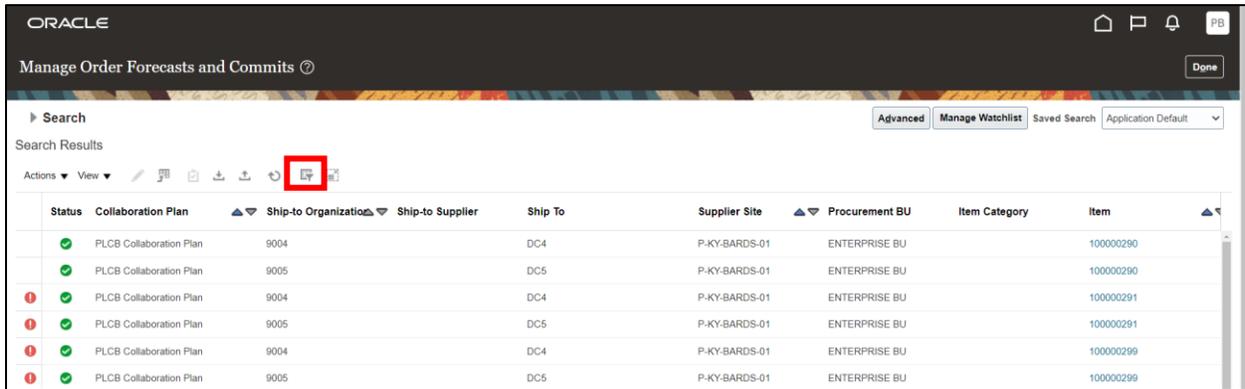
Link to eLearning video: [Search by “Query by Example” Function](#)

1. Navigate to the Manage Order Forecasts and Commits Screen.
2. Perform a blank search.



The Search Results will appear.

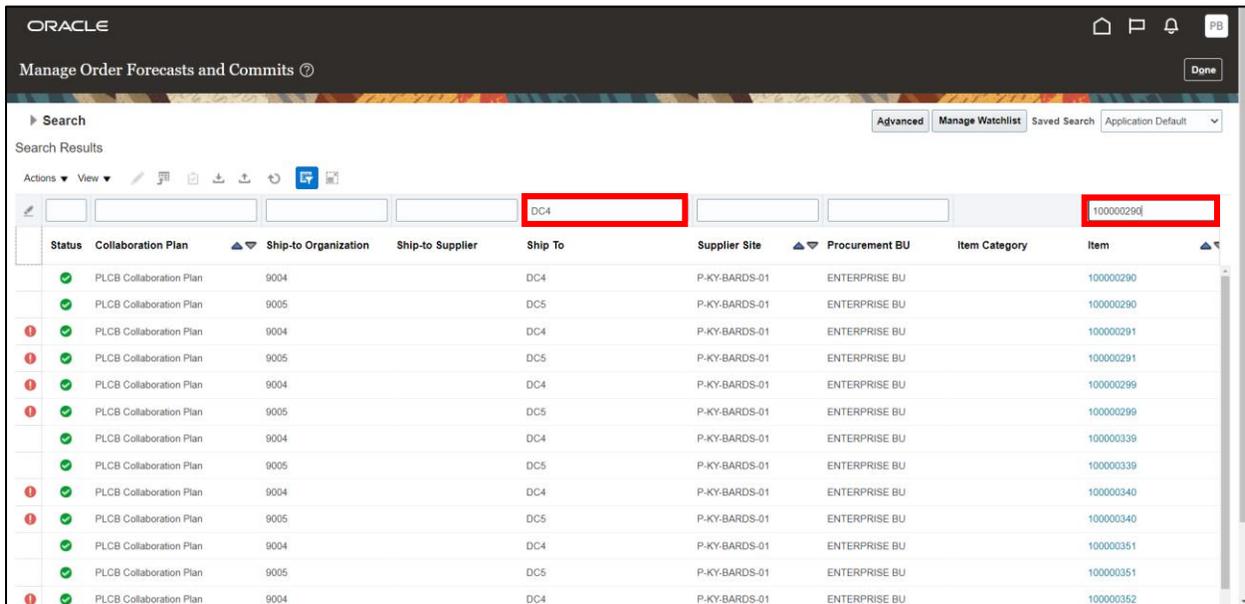
3. Click the Query By Example Icon.



A row of fields will appear above the column headers.

4. Enter the desired search criteria in one or several fields.

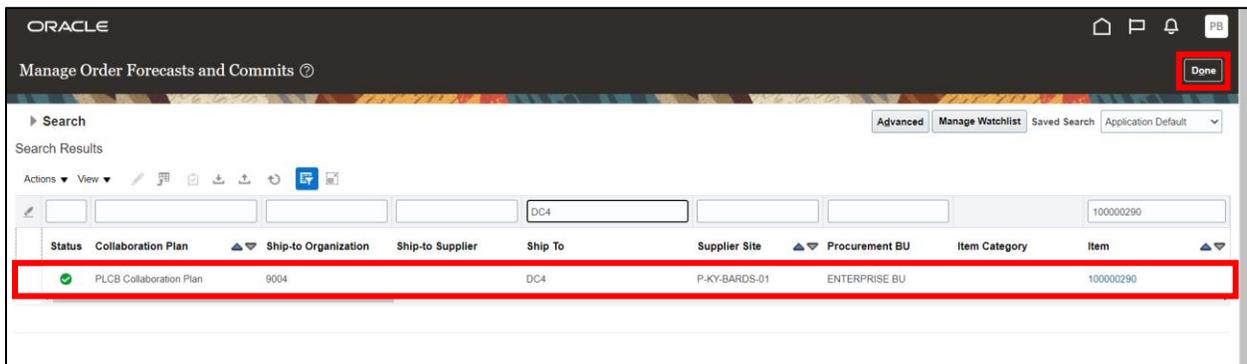
Note: This allows users to further narrow down search results in addition to any criteria entered on the Search Section.



5. Press the Enter key on the keyboard.

The Filtered Search Results will appear.

6. Click **Done** to exit.



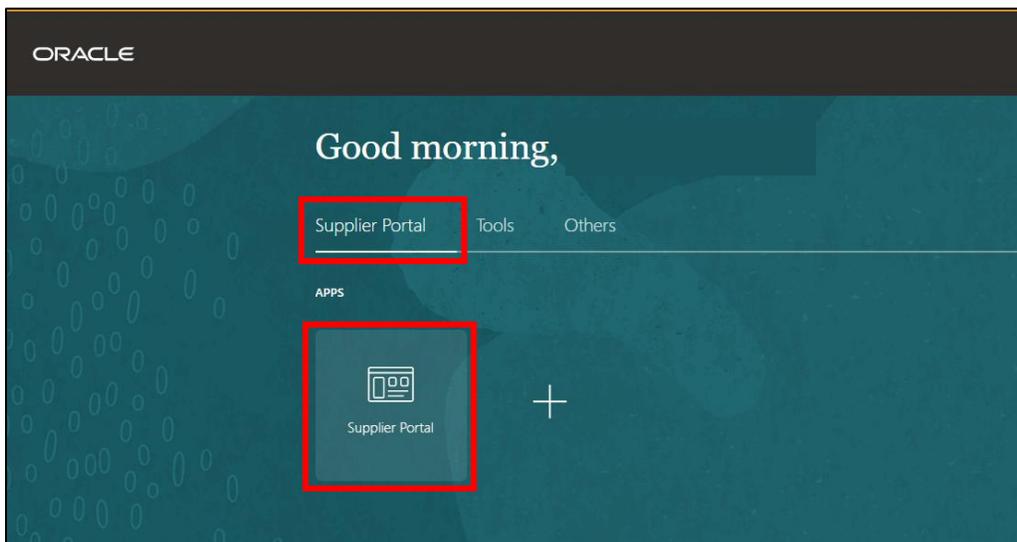
Searching on the Manage Products Screen

The Manage Products Screen in the Supplier Portal is used by the supplier to create items and update attributes for existing items.

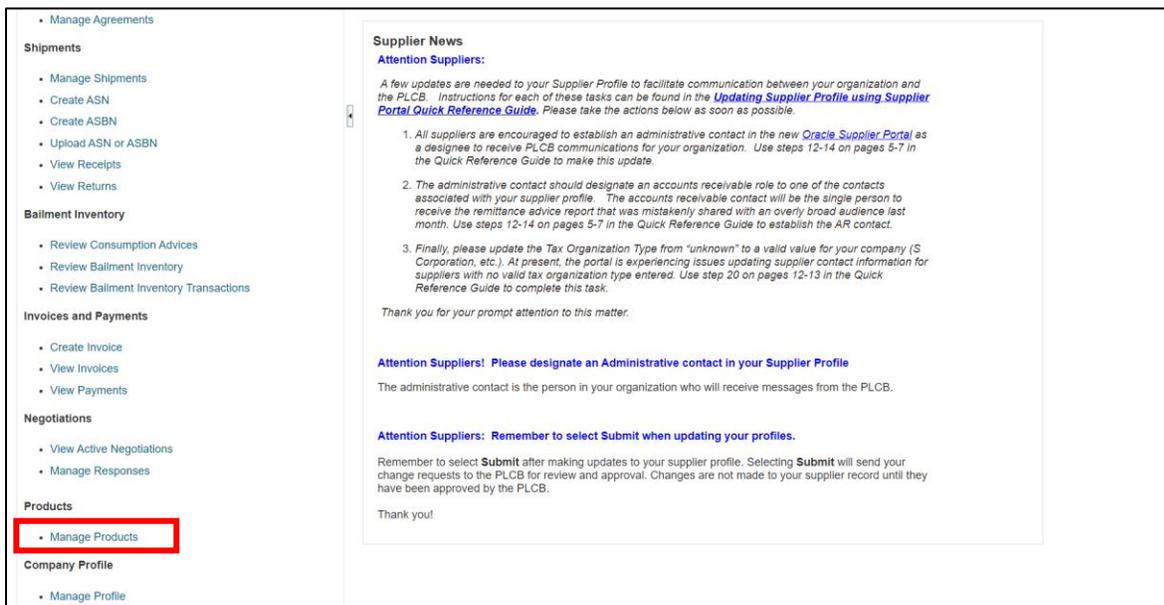
However, supplier-requested items and item changes will only be active once approved by the PLCB.

Link to eLearning video: [Searching on the Manage Products Screen and Saving the Search](#)

1. Navigate to the Welcome Springboard.
2. Click the **Supplier Portal Tab**, then click the **Supplier Portal Tile**.

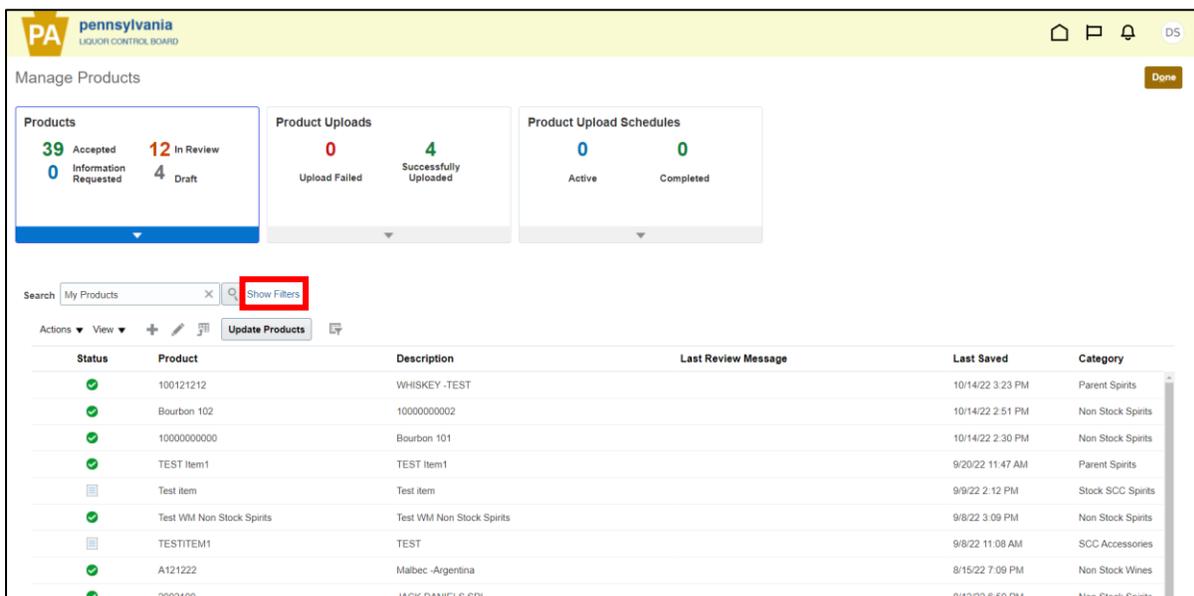


3. Click **Manage Products** under the Products Heading.



The Manage Products Screen will appear.

4. Click **Show Filters** to view all the available filters.



The Filters Section will appear.

5. Enter the desired search criteria. Users can enter information in any of the following fields to locate a previously submitted item request:

Field Name	Field Type	Input	Instructions
Saved Search	Dropdown	User	Default is “My Products.” Any custom searches saved by the user are displayed here.
Product	Text	User	Type the product value (for example, Universal Product Code (UPC)) that was entered when submitting the item. This is the most precise way to search for an item request.
Status	Dropdown	User	Choose from the following options: <ul style="list-style-type: none"> • Draft • Submitted • In review • Accepted • Rejected • Information requested
Category	Dropdown	User	Select category for the item request to narrow the search (Parent, SCC or Non-stock).
Last Saved	Date	User	Select a date range from the calendar to narrow the search by the last time the item request was saved.
Created By	Text	User	Default is the email address of the user who is logged into the Supplier Portal. Delete the email address to see all the supplier’s items, regardless of who entered them.

Note: In this example, we have selected a category.

6. Click Search.

Status	Product	Description	Last Review Message	Last Saved	Category
✓	100121212	WHISKEY -TEST		10/14/22 3:23 PM	Parent Spirits
✓	Bourbon 102	1000000002		10/14/22 2:51 PM	Non Stock Spirits
✓	1000000000	Bourbon 101		10/14/22 2:30 PM	Non Stock Spirits
✓	Non_Stock Spirit 3	Non_Stock Spirit 3		10/14/22 6:58 AM	Non Stock Spirits
✓	TEST Item1	TEST Item1		9/20/22 11:47 AM	Parent Spirits
✓	Test Parent Spirit	Test Parent Spirit		9/19/22 7:48 AM	Parent Spirits
✓	Test SCC	Test SCC Spirit 2		9/9/22 2:52 PM	Stock SCC Spirits
ⓘ	Test item	Test item		9/9/22 2:12 PM	Stock SCC Spirits
✓	Test Non Stock Spirit	Test Non Stock Spirit		9/9/22 10:12 AM	Non Stock Spirits
✓	test mandatory UDA3	test mandatory UDA3		9/9/22 8:22 AM	Stock SCC Spirits
✓	Test Mandatory UDA1	Test Mandatory UDA2		9/9/22 7:38 AM	Parent Spirits
✓	Test WM Non Stock Spirits	Test WM Non Stock Spirits		9/8/22 3:09 PM	Non Stock Spirits

The Search Results will display.

7. Click Done to exit.

Status	Product	Description	Last Review Message	Last Saved	Category
ⓘ	123456	BAREFOOT WINE		7/14/22 11:15 AM	Parent Wines
✓	E2E-005-01.4	Round Pond Estate Sauvignon Blanc Ruther...		6/9/22 7:45 AM	Parent Wines
✗	000001234	Domnic's Wine	This item is rejected	6/7/22 1:51 PM	Parent Wines
✓	E2E-005-01.2	Girard Chardonnay Russian River Valley 2015		6/6/22 8:07 AM	Parent Wines
ⓘ	E2E-005-01.1	Girard Chardonnay Russian River Valley 2015		6/6/22 7:21 AM	Parent Wines
ⓘ	DIAGEO_WINE1	DIAGEO_WINE1		6/3/22 4:09 PM	Parent Wines
✓	Ron's Better Wine	A blend of red wines from California		5/31/22 5:58 PM	Parent Wines
ⓘ	Ron's Wine	A blend of red wines from California		5/31/22 4:58 PM	Parent Wines
ⓘ	Testnewuda	test picb item number		5/30/22 10:58 AM	Parent Wines

Note: Click Hide Filters to hide the filters and return to the default view.

Create Saved Search on Manage Products Screen

After performing the search, users can save the search to use it each time they access the Manage Products Screen.

Follow these steps to save the custom search.

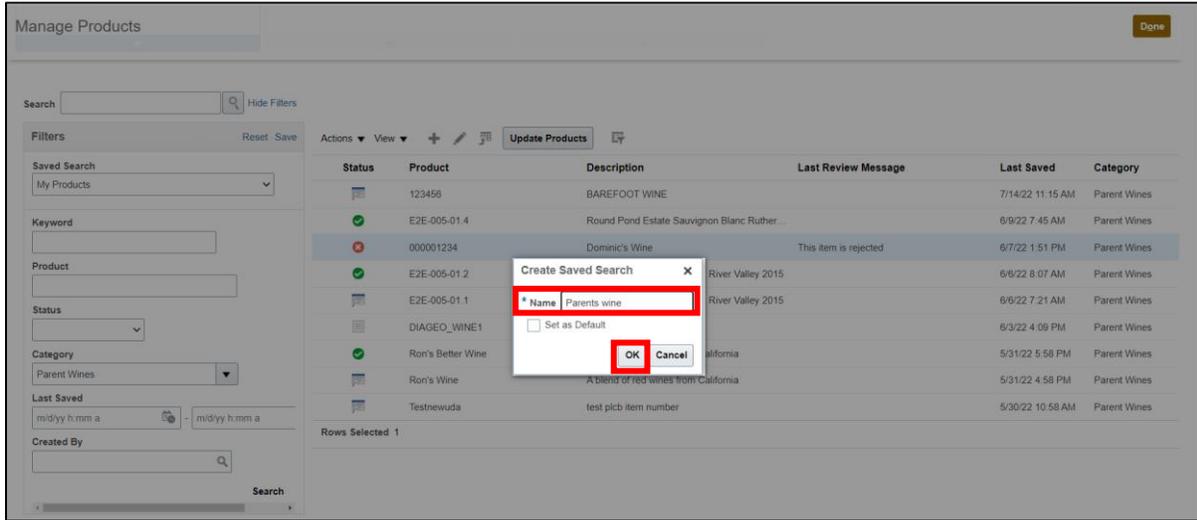
Link to eLearning video: [Searching on the Manage Products Screen and Saving the Search](#)

1. Enter [Search Criteria] in the Filters Screen.
2. Click **Save** at the top of the Filters Screen.

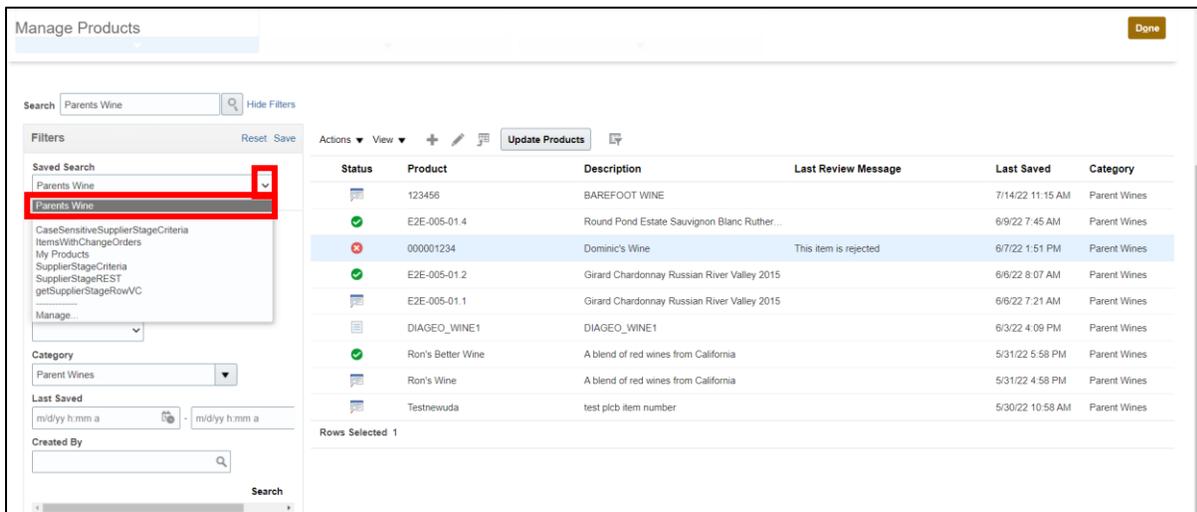
The screenshot shows the 'Manage Products' interface. On the left, there is a 'Filters' panel with a 'Save' button highlighted in red. The main area displays a table of products with columns for Status, Product, Description, Last Review Message, Last Saved, and Category. The table contains several rows, including one for 'Dominic's Wine' which is marked as rejected.

Status	Product	Description	Last Review Message	Last Saved	Category
	123456	BAREFOOT WINE		7/14/22 11:15 AM	Parent Wines
✓	E2E-005-01.4	Round Pond Estate Sauvignon Blanc Ruther...		6/9/22 7:45 AM	Parent Wines
✗	000001234	Dominic's Wine	This item is rejected	6/7/22 1:51 PM	Parent Wines
✓	E2E-005-01.2	Girard Chardonnay Russian River Valley 2015		6/6/22 8:07 AM	Parent Wines
	E2E-005-01.1	Girard Chardonnay Russian River Valley 2015		6/6/22 7:21 AM	Parent Wines
	DIAGEO_WINE1	DIAGEO_WINE1		6/3/22 4:09 PM	Parent Wines
✓	Ron's Better Wine	A blend of red wines from California		5/31/22 5:58 PM	Parent Wines
	Ron's Wine	A blend of red wines from California		5/31/22 4:58 PM	Parent Wines
	Testnewuda	test plcb item number		5/30/22 10:58 AM	Parent Wines

3. Type a **Name** for the saved search.
4. Check **Set as Default** box to save the search as the default if required.
5. Click **OK**.



Note: The saved search displays as an option in the dropdown next to Saved Search.



Wildcard Search Queries %

When entering search values, users can apply the percent sign (%) as a wildcard to search for generic items. For example, to search for all orders beginning with 8 and contains the number 5 (such as 80003715, 80003156), enter “8%5” in the Order Field.

The % wildcard does not control the number of wildcard characters. The search logic attempts to find matches containing values in any position. Below is an example.

Link to eLearning video: [Perform a Wildcard Search Query in Oracle Supplier Portal](#)

The screenshot shows the Oracle Supplier Portal interface for managing orders. The search criteria are set to "Order" with the value "8%5". The search results table is as follows:

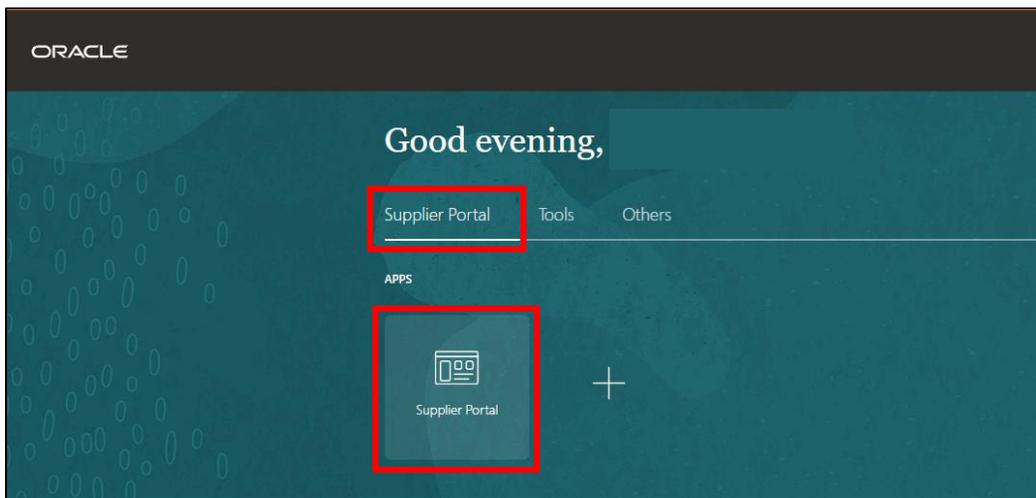
Order	Order Date	Description	Supplier Site	Buyer	Ordered	Currency	Status	Life Cycle	Creation Date
80003715	9/21/22		P-KY-LOUIS-03	NO DATA AVAIL...	8,128.26	USD	Open		9/21/22
80003615	9/7/22		P-KY-LOUIS-03	NO DATA AVAIL...	12,996.18	USD	Open		9/7/22
80003538	9/5/22		P-KY-LOUIS-03	Bhagavatula, C...	12,996.18	USD	Open		9/5/22
80003532	9/1/22		P-KY-LOUIS-03	NO DATA AVAIL...	12,996.18	USD	Open		9/1/22
80003531	9/1/22		P-KY-LOUIS-03	NO DATA AVAIL...	12,996.18	USD	Open		9/1/22

Overview of Profile Management

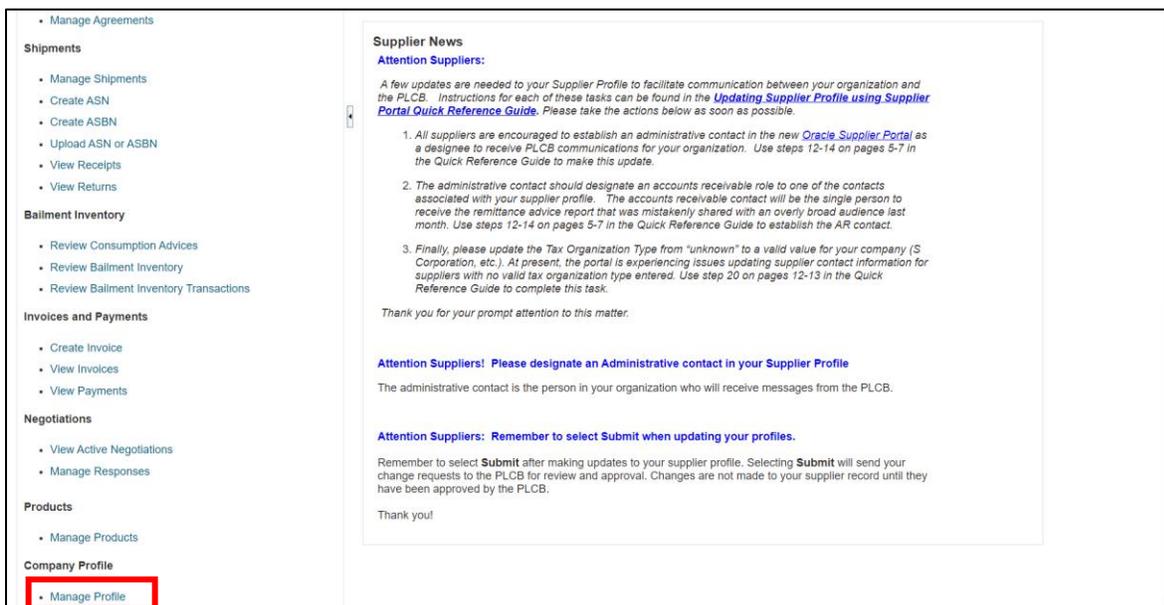
Suppliers can also manage their data including profiles, bank, address and contact information using the Supplier Portal.

Link to eLearning video: [Overview of Profile Management](#)

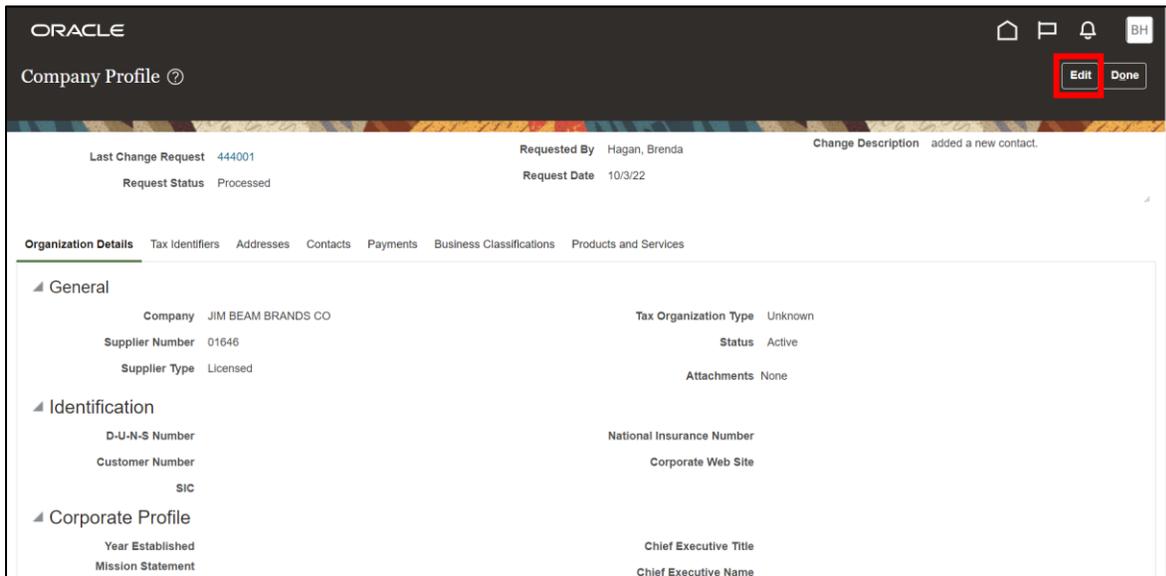
1. Navigate to the Welcome Springboard.
2. Click **Supplier Portal Tab**, then click the **Supplier Portal Tile**.



3. Click **Manage Profile** under the Company Profile Section.



4. Select the desired tab to make the changes to, then click **Edit**.



Note: For detailed steps on profile management, refer to the [Supplier - Manage Supplier Data in Oracle Supplier Portal QRG](#).